Conservator Account Filing User Manual

MINNESOTA
JUDICIAL BRANCH

Conservator Account Filing User Manual

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Table of Contents

About Conservator Account Filing

A **conservator** is appointed to make **financial decisions** for the protected person ("Conservatee"). The conservator typically has the power to enter into contracts, pay bills, invest assets, and perform other financial functions for the protected person. A **Conservatorship** is tailored to transfer financial decision-making power to the conservator only in the areas of life where protection and supervision by a conservator has been proven necessary.

The Conservator Account Filing system records financial information for adult conservatees only. For information about protecting the interests of minor children involved in the courts, please refer to the Guardian ad Litem Program on the state court website.

About this Document

This document is available on the state court website under Programs and Services > Conservator Account Filing. It provides instructions to users on how to enter information in the Conservator Account Filing system. This document is not intended to instruct users on what information to enter. Due to the complexities of many of the proceedings to establish or maintain a Conservatorship, it is recommended that a person talk with an attorney with experience in Conservatorship law.

Other Resources

There are several resources available on the mcourts.gov website to assist with getting set up and using the Conservator Account Filing system, some of which are *required in order to obtain access to the system. Some of these resources are:

- Self Help Center: Guardianship and Conservatorship
- Guardianship/Conservatorship Forms
- Introduction for Newly Appointed Guardians and Conservators (*required tutorial)

For Assistance

Contact your local Probate Court with questions regarding the Conservator Account Filing system. It is also recommended that the Court Administrator's Office of the Probate Division of the District Court in which the petition will be filed be contacted to determine which forms to use and what the correct filing fee will be.

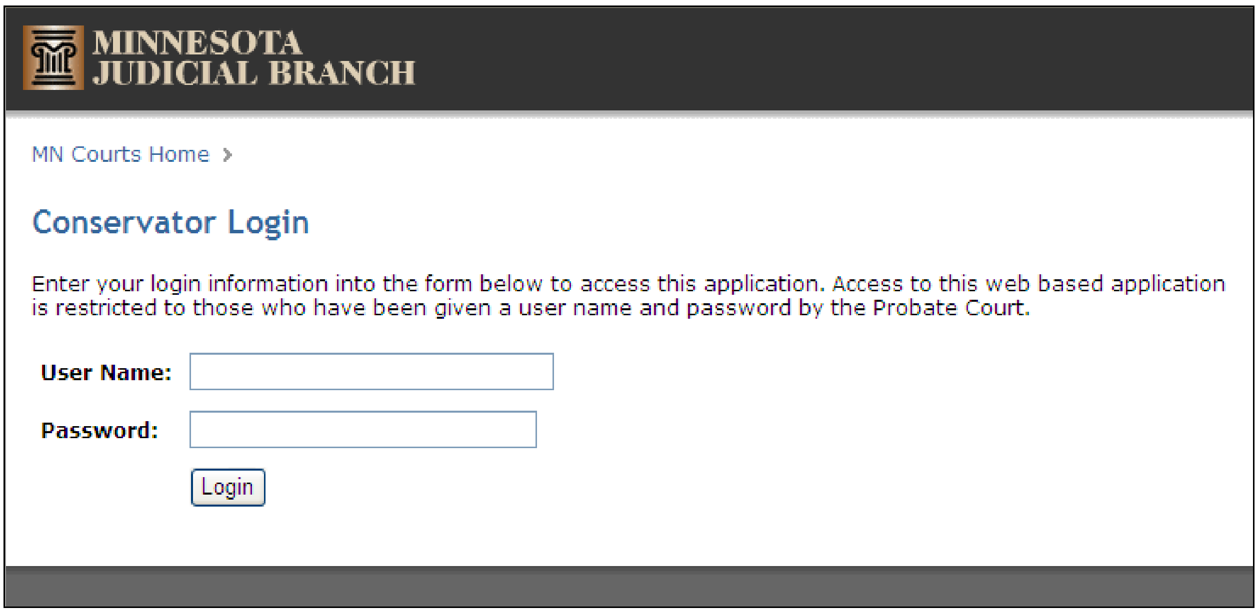
Getting Started

A user name and password is needed to log into the Conservator Account Filing application. There are two requirements in order to obtain a user name and password: (1) view the Conservatorship tutorials, and (2) submit a *signed, notarized* E-Filing Acknowledgment Form.

Once a user views the Conservatorship tutorials and the court receives the signed, notarized E-Filing Acknowledgment Form, a user name and password will be mailed within 5 days. The user name and password will not be issued until the acknowledgment is filed.

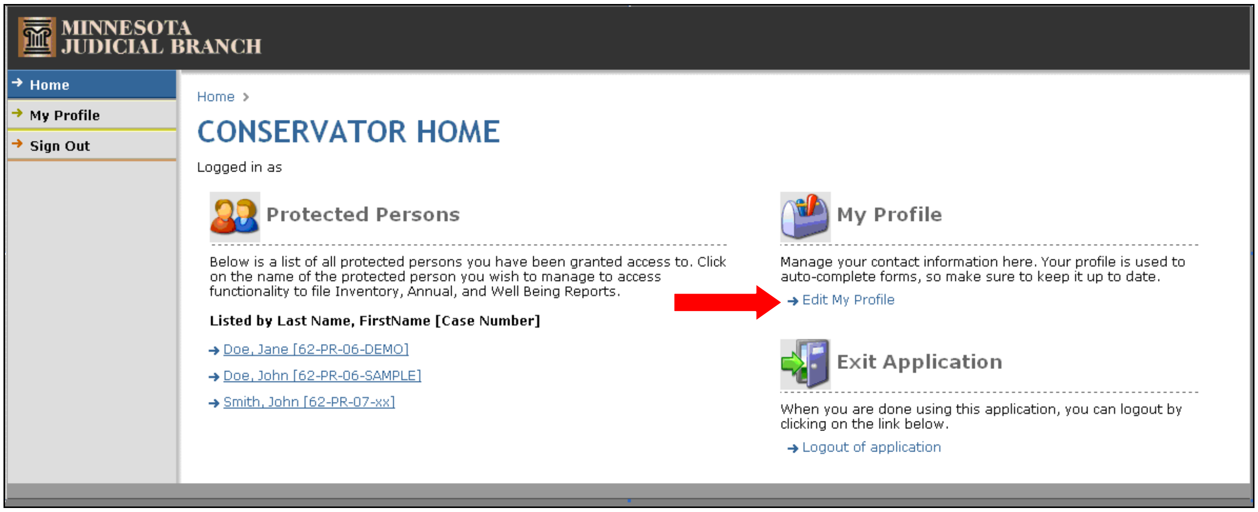
Logging In

1. Open the Web page by using the link on the state court's website: http://conservatorship.courts.state.mn.us/RamseyProbate/Application/Login/
2. The following web page will display. Type your username and password in the appropriate fields and click **Login**.

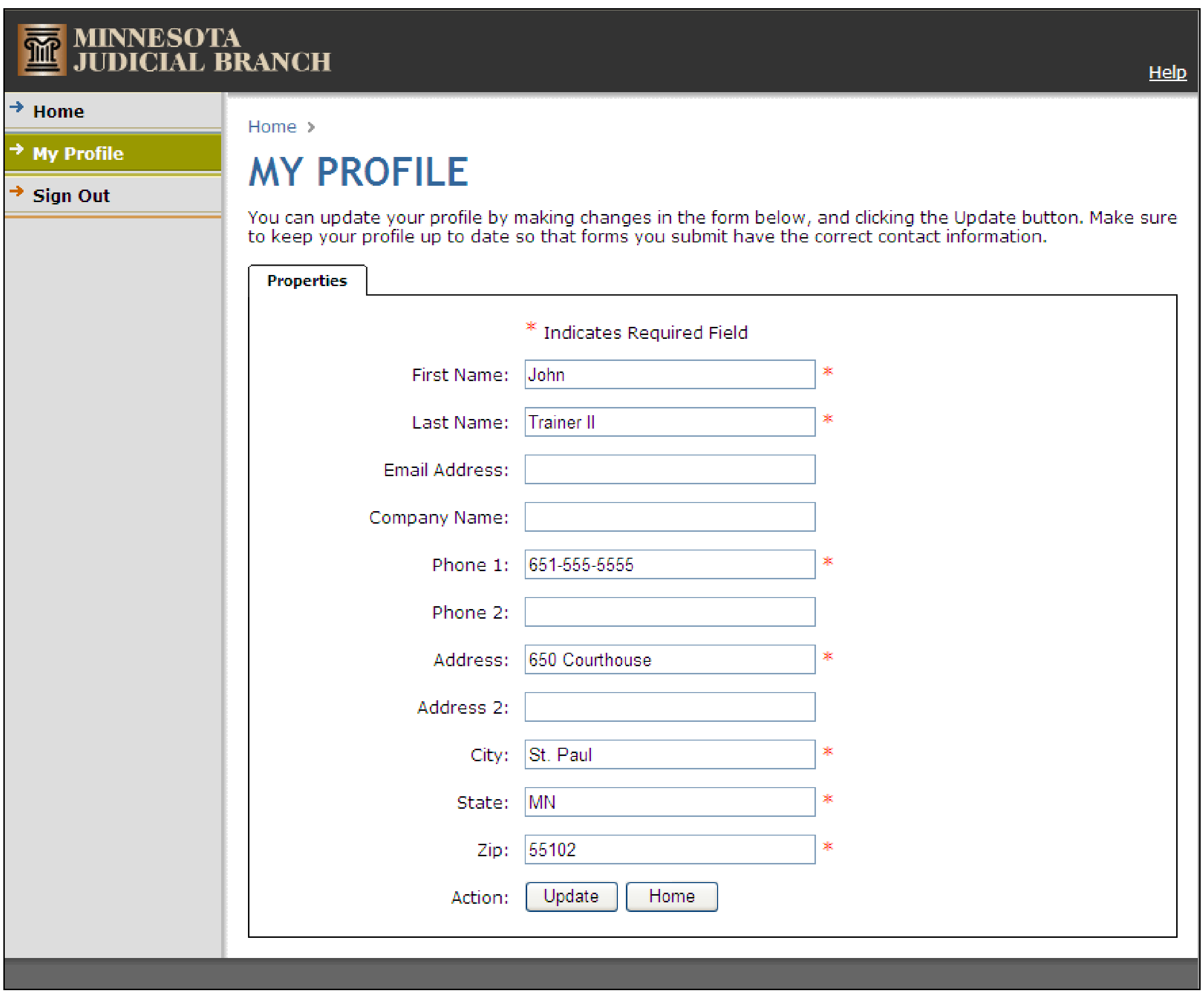


Updating Conservator's Profile

After logging in, the Conservator Homepage appears. Click **Edit My Profile** to update address and telephone information, if necessary.



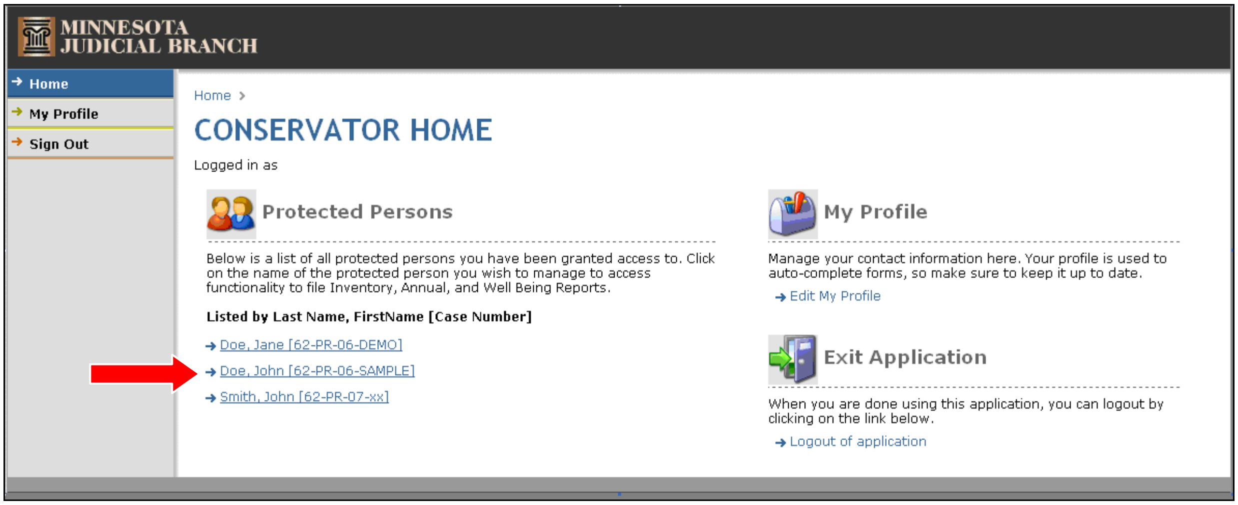
Change any necessary contact information and click **Update**. If there are no changes, click **Home** to return to the Conservator Home page.



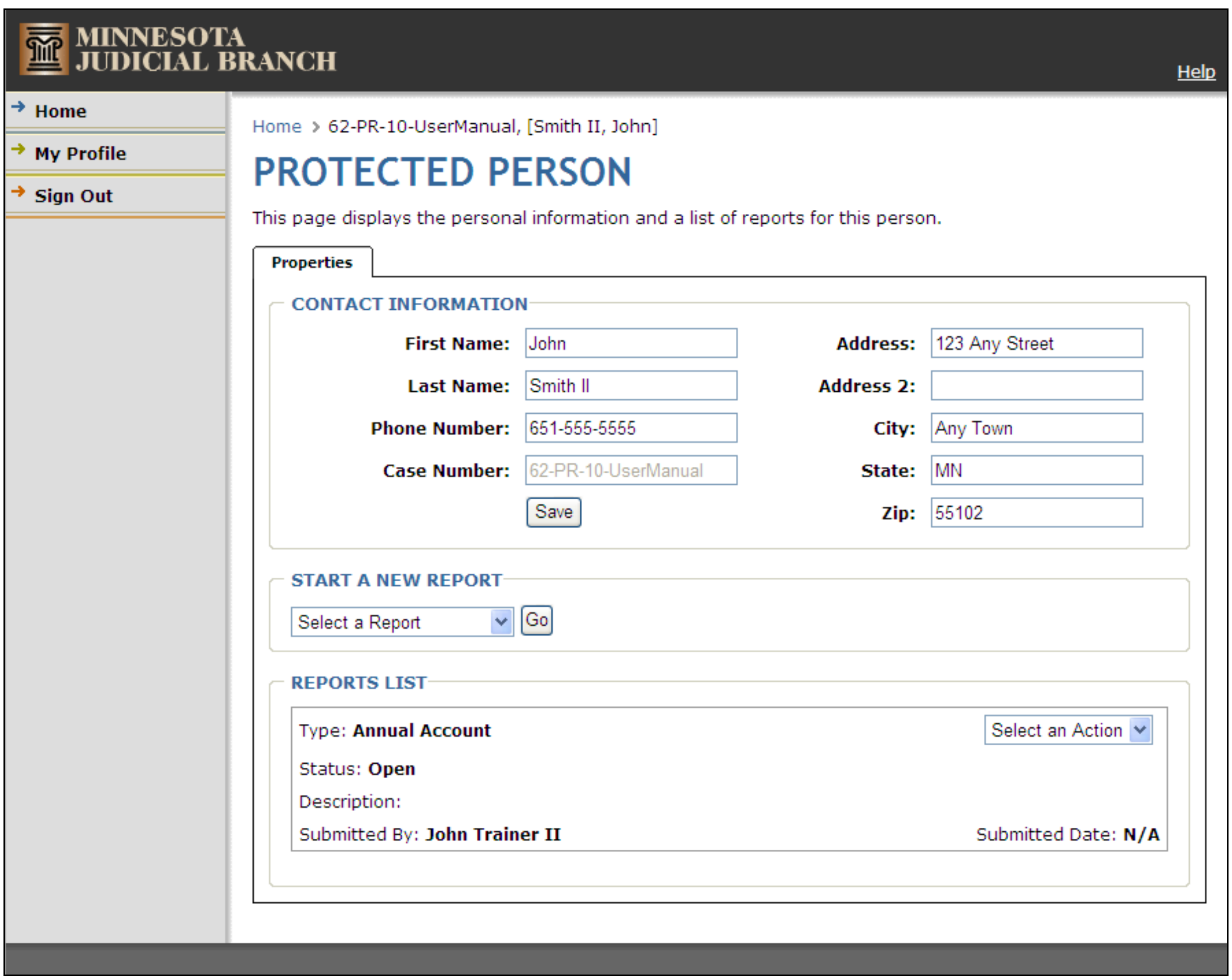
Reports

Working with Reports

From the Conservator Home page, under Protected Persons, choose a conservatorship from the list for which you want to work on a report.



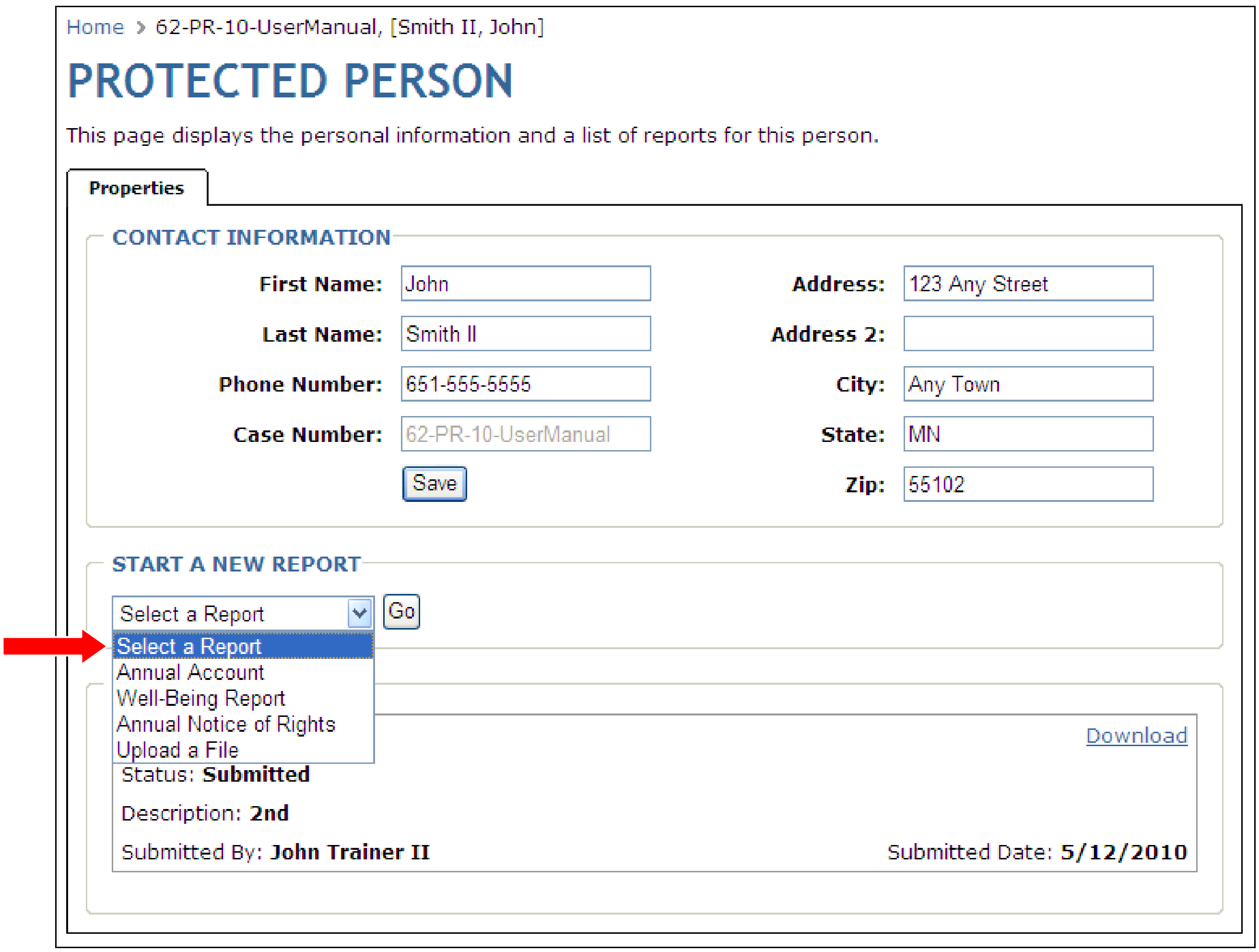
Once the Protected Person's contact information appears, the user may update the protected person's contact information, start a new report, or work on an existing report.



To start a new report, from the Start a New Report drop-down, select from the following reports:

click a link below for detailed instructions

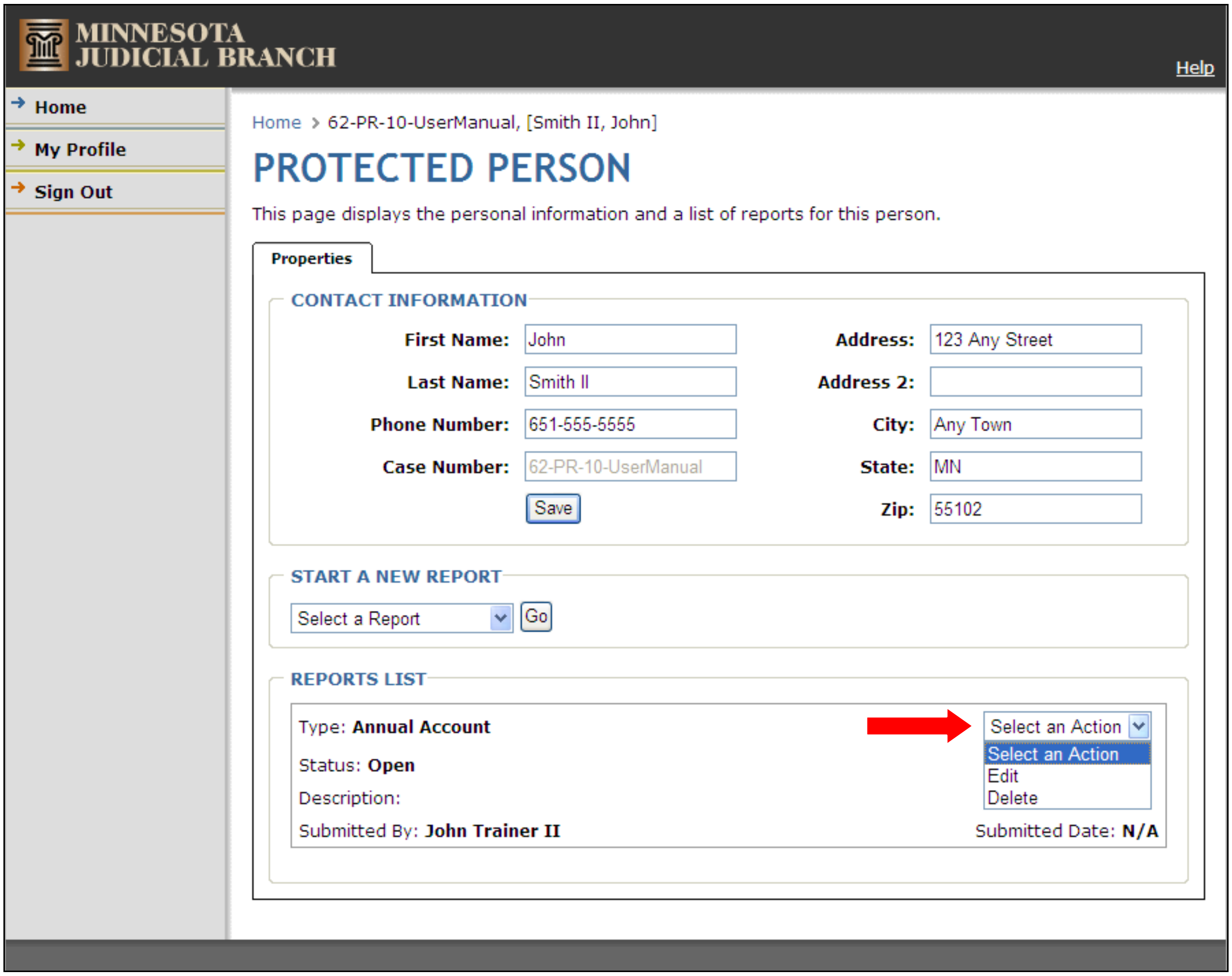
- Inventory Report
- Annual Account
- Well Being Report
- Annual Notice of Rights
- Upload a File



To continue working on an existing report or delete a saved report that has not been submitted, under Reports List, select an action from the drop-down.

click a link below for detailed instructions

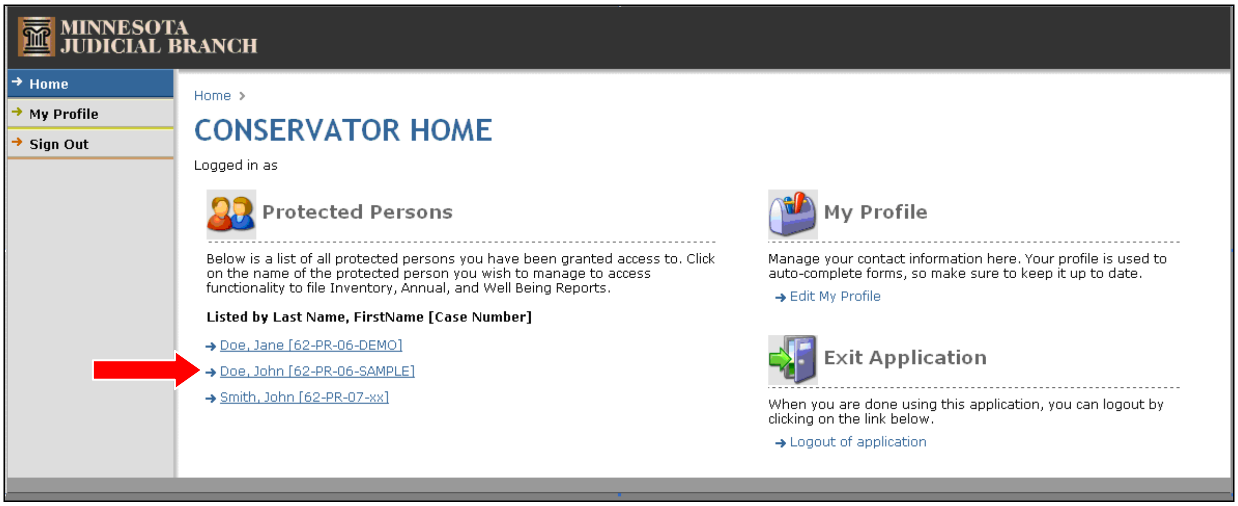
- Edit an existing report
- Delete a report



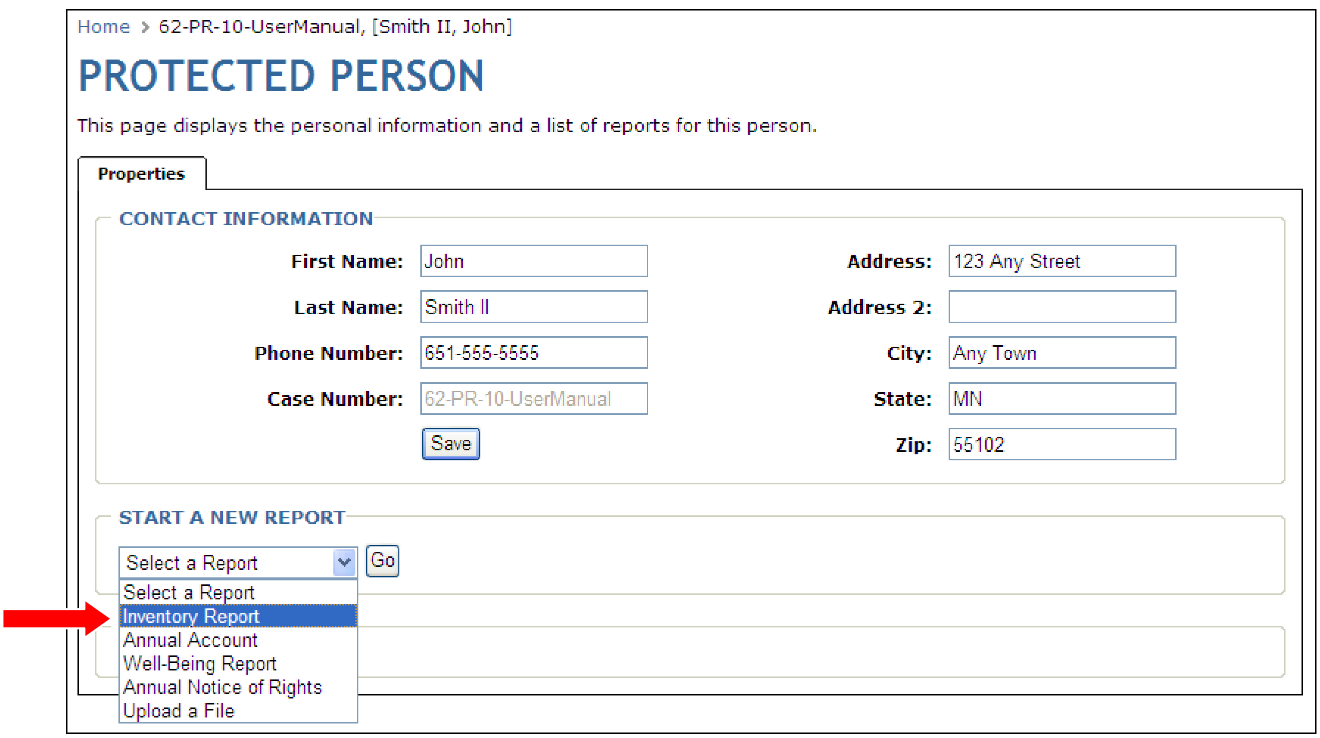
Entering an Inventory Report

The Inventory report is generally completed and filed only once at the beginning of the conservatorship. It includes all the assets of the protected person and is the basis for starting the first annual report. If you make a mistake or discover additional assets, that information must be submitted by completing an Annual Account form.

From the Conservator Home page, under the Protected Persons heading, select the case file for which you wish to create the Inventory Report.

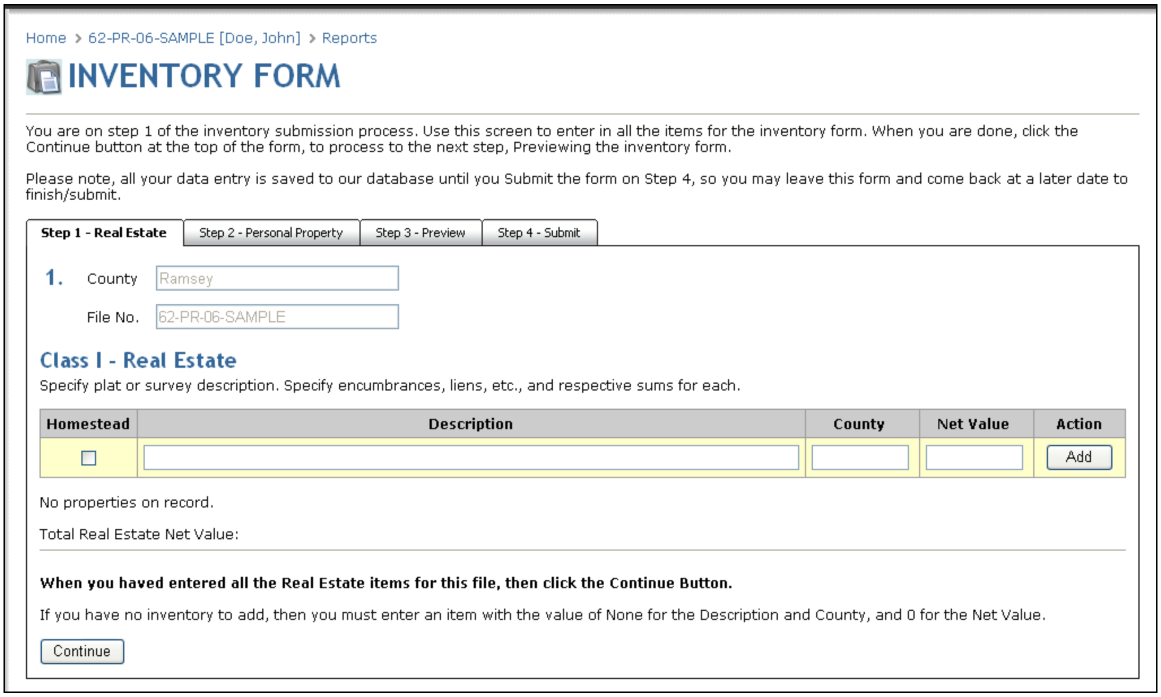


The reports page for the selected protected person appears. Under the Start a New Report heading, click the drop-down, select **Inventory**, and click **Go**.



I. Complete the Step 1 - Real Estate section:

1. Enter the description of each parcel of real estate, along with the county and value information.
2. If the real estate is the protected person's Homestead, check the Homestead box.
3. When the information is complete, click **Add**.
4. Repeat the steps above to enter additional parcels of real estate.



Note:

A separate entry should be made for each parcel of real estate.

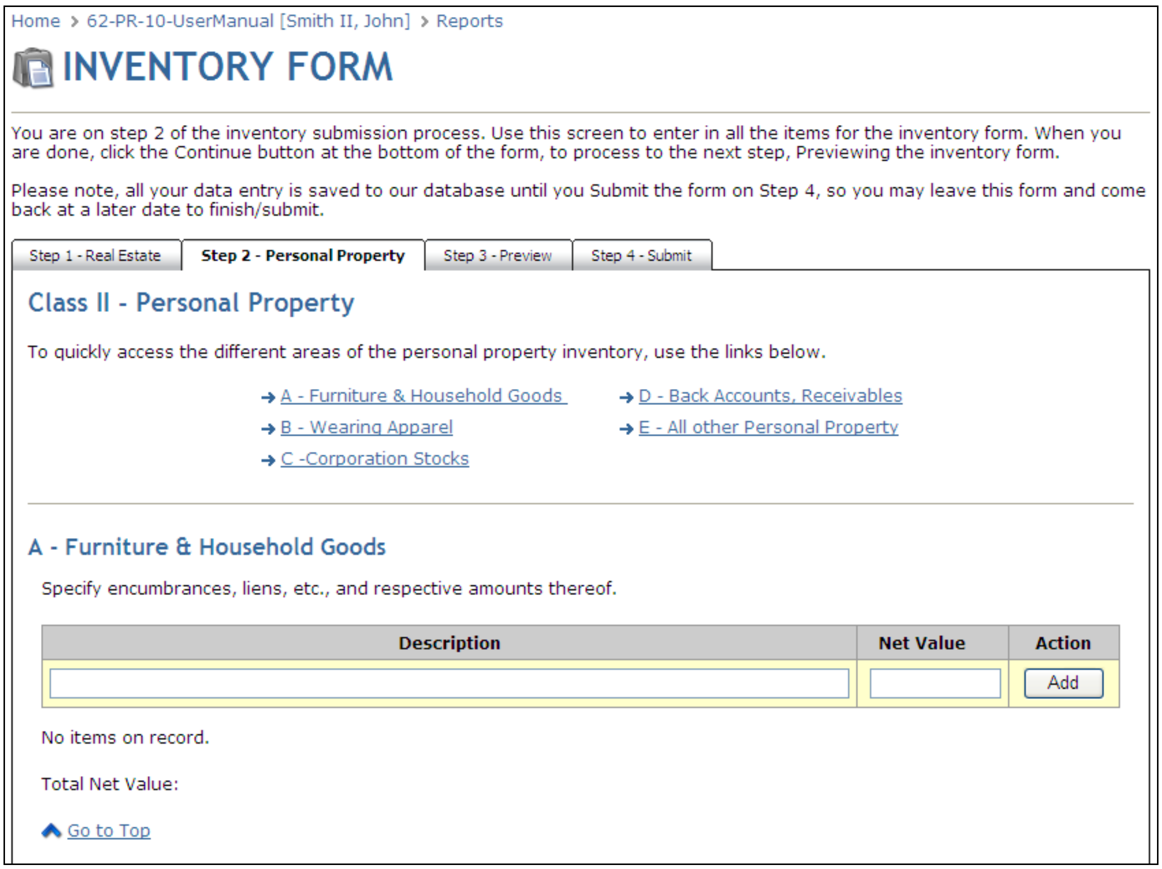
If there is no real estate, enter "NONE" in the description and enter "0" for the value.

5. Click **Continue**.

II. Complete the Step 2 – Personal Property section:

> **Note:**
>
> A separate entry should be made for each item, or group of items, of personal property.
>
> If there is no personal property in a particular category, enter "NONE" in the description and enter "0" for the value.

A. Furniture & Household Goods



Home > 62-PR-10-UserManual [Smith II, John] > Reports

INVENTORY FORM

You are on step 2 of the inventory submission process. Use this screen to enter in all the items for the inventory form. When you are done, click the Continue button at the bottom of the form, to process to the next step, Previewing the inventory form.

Please note, all your data entry is saved to our database until you Submit the form on Step 4, so you may leave this form and come back at a later date to finish/submit.

Step 1 - Real Estate | Step 2 - Personal Property | Step 3 - Preview | Step 4 - Submit

Class II - Personal Property

To quickly access the different areas of the personal property inventory, use the links below.

A - Furniture & Household Goods
B - Wearing Apparel
C -Corporation Stocks
D - Back Accounts, Receivables
E - All other Personal Property

A - Furniture & Household Goods

Specify encumbrances, liens, etc., and respective amounts thereof.

Description	Net Value	Action
		Add

No items on record.

Total Net Value:

Go to Top

B. Wearing Apparel

C. Corporation Stocks

D. Bank Accounts, Certificates of Deposit, Receivables

B- Wearing Apparel

Specify encumbrances, liens, etc., and respective amounts thereof.

Description	Net Value	Action
		Add

No items on record.

Total Net Value:

Go to Top

C - Corporation Stocks

Identify all stock holdings. Specify encumbrances, liens, etc., and respective amounts thereof.

Description	Net Value	Action
		Add

No items on record.

Total Net Value:

Go to Top

D - Bank Accounts, Certificates of Deposit, Receivables

Specify the institution and enter a description for each account.

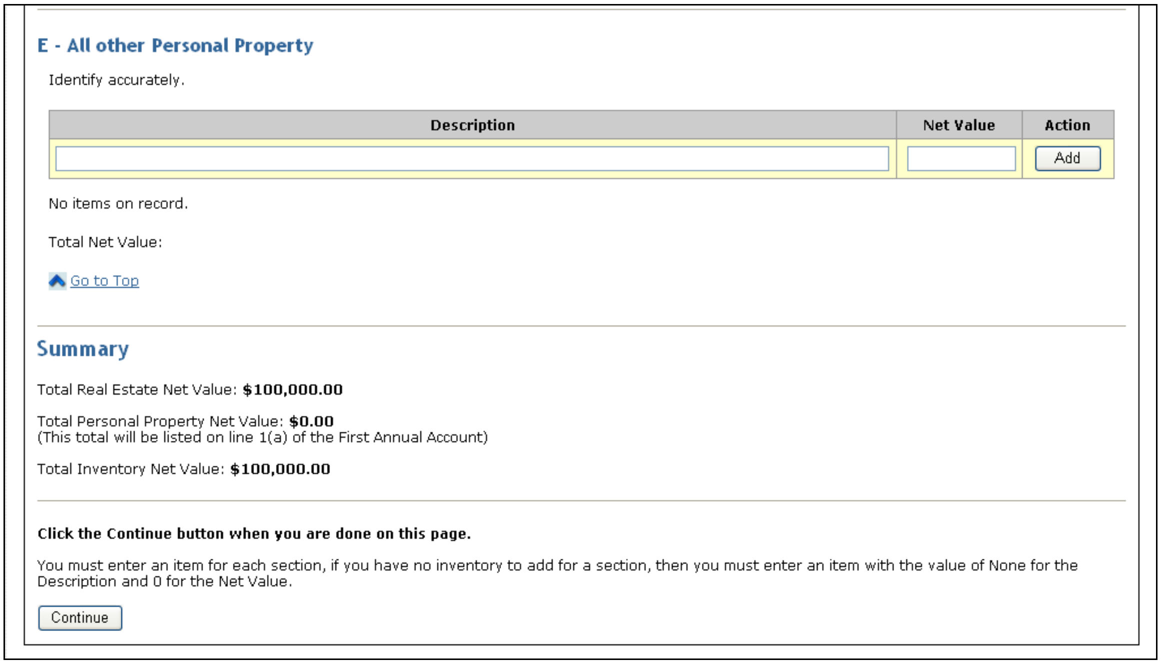
Description	Net Value	Action
		Add

No items on record.

Total Net Value:

Go to Top

E. All other Personal Property



E - All other Personal Property

Identify accurately.

Description	Net Value	Action
		Add

No items on record.

Total Net Value:

Go to Top

Summary

Total Real Estate Net Value: **$100,000.00**

Total Personal Property Net Value: **$0.00**
(This total will be listed on line 1(a) of the First Annual Account)

Total Inventory Net Value: **$100,000.00**

Click the Continue button when you are done on this page.

You must enter an item for each section, if you have no inventory to add for a section, then you must enter an item with the value of None for the Description and 0 for the Net Value.

Continue

The value of all personal property is automatically totaled and displayed near the bottom of the form.

Deleting Items

After clicking Add for each item, the total net value is updated in each category and a delete link appears next to each entry. If a mistake is made, click Delete. The item description will be removed and the amount will be subtracted from the total net value.

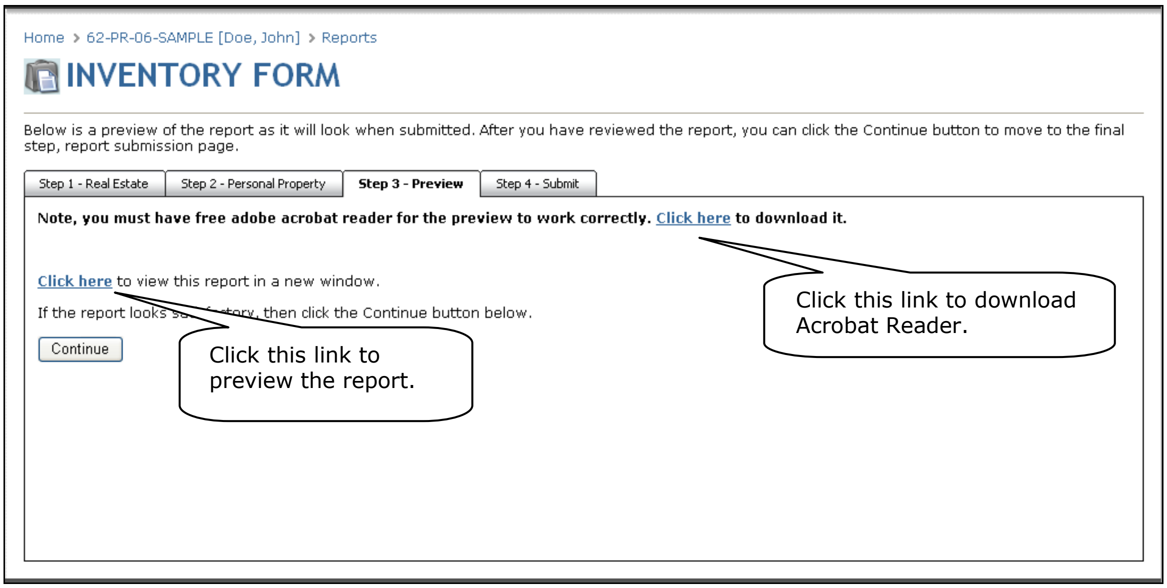
F. When finished with all entries, click **Continue** to preview the report.

III. Complete the Step 3 – Preview section:

A. From this page, preview the report in a PDF format using Adobe Acrobat Reader. If you do not have Acrobat Reader, a link is provided to download it for free.

Note:

Attorney information will not be available on the PDF preview. Enter attorney information in the Step 4 – Submit section.



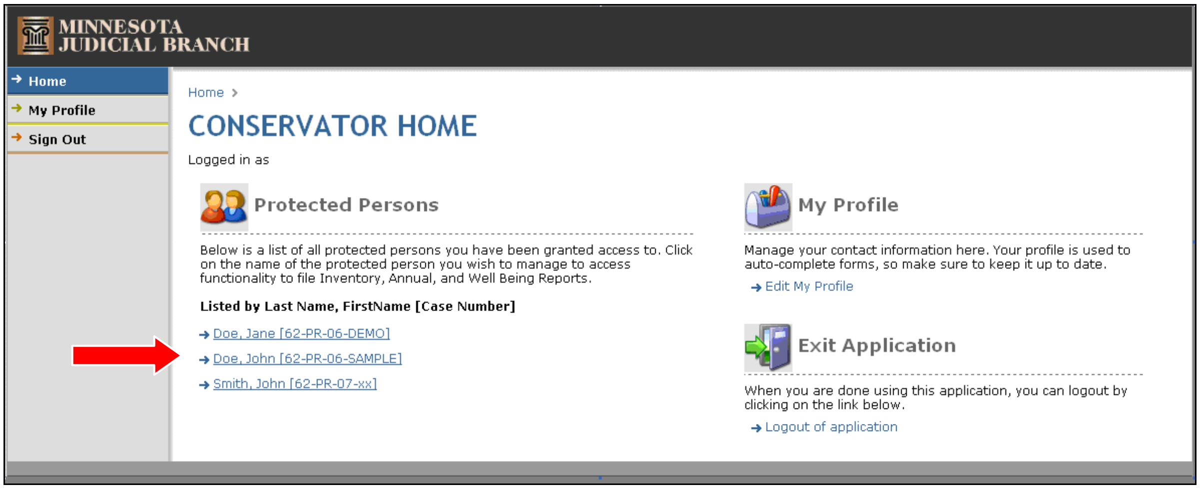
B. After previewing the report, click **Continue**.

IV. To submit the report to the Court, complete Step 4 – Submit. Refer to the Submitting the Report section in this manual for instructions.

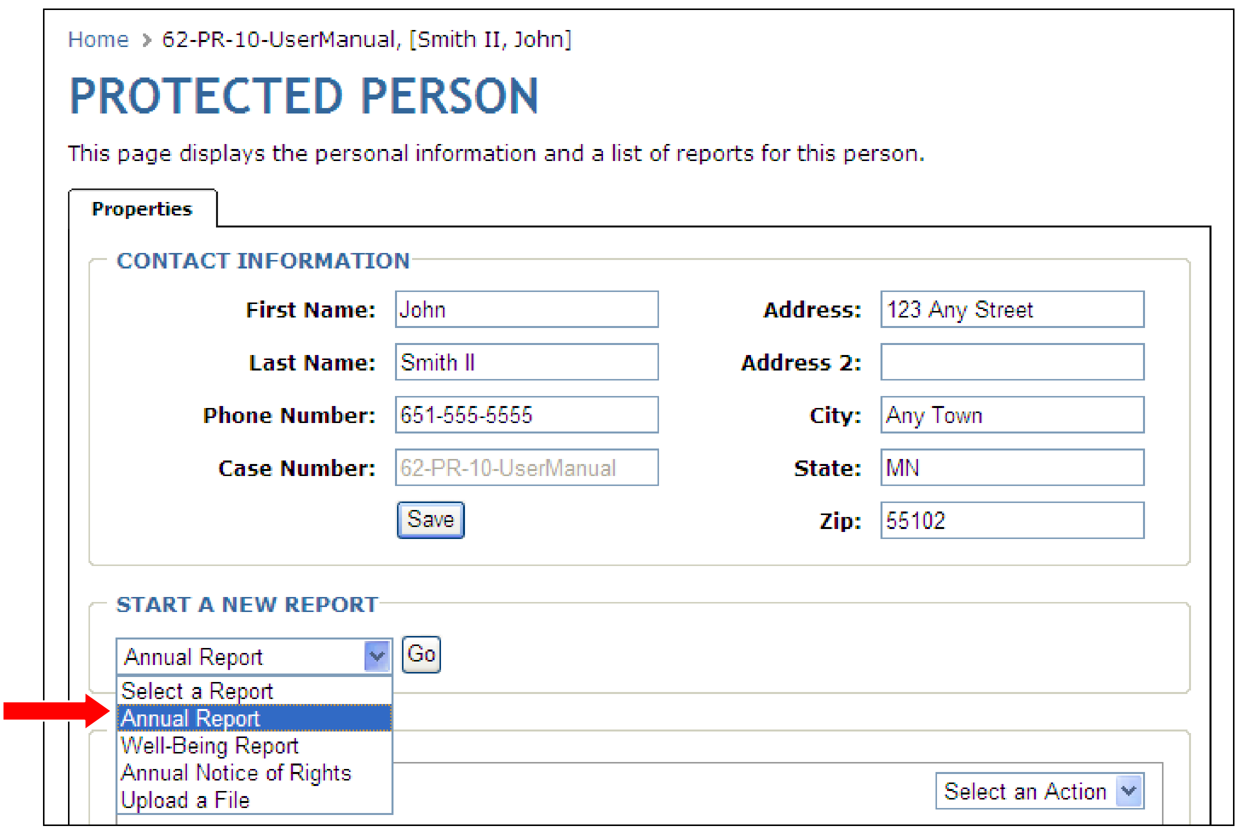
Entering an Annual Account

The Annual Account Report is an annual report that is to be submitted only once every year.

From the Conservator Home page, under the Protected Persons heading, select the case file for which you wish to create the Annual Report.



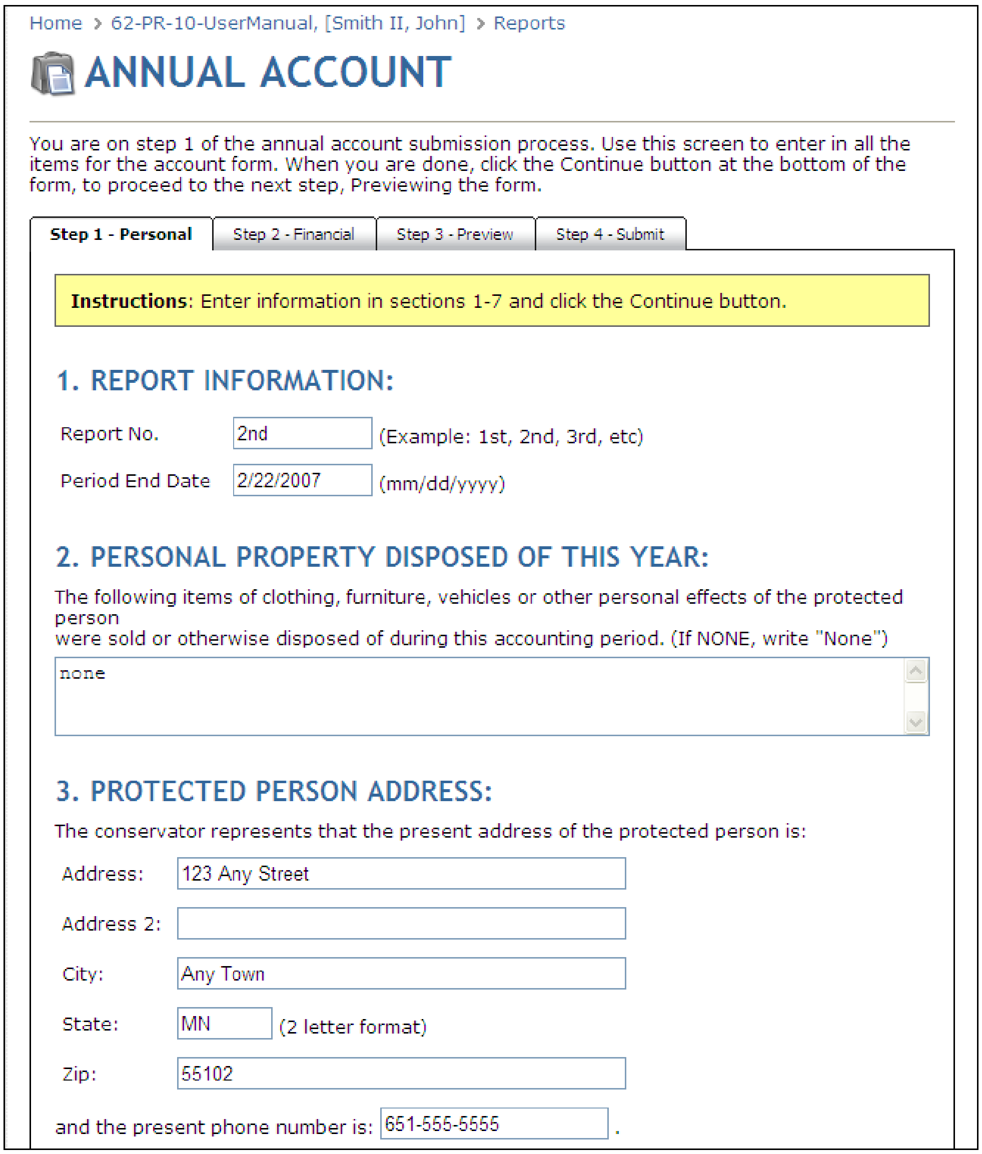
The reports page for the selected protected person appears. Under the Start a New Report heading, click the drop-down, select **Annual Report**, and click **Go**.



I. Complete the Step 1 - Personal section:

1. Report Information – Report Number. and Period End Date
2. Personal Property Disposed of during the reporting period.
3. Protected Person Address – correct any address information as needed.

> **Note:**
>
> Each item must have an entry. If there was no personal property disposed, or if there is no bond, enter "NONE" in these boxes.


Home > 62-PR-10-UserManual, [Smith II, John] > Reports

ANNUAL ACCOUNT

You are on step 1 of the annual account submission process. Use this screen to enter in all the items for the account form. When you are done, click the Continue button at the bottom of the form, to proceed to the next step, Previewing the form.

Step 1 - Personal | Step 2 - Financial | Step 3 - Preview | Step 4 - Submit

Instructions: Enter information in sections 1-7 and click the Continue button.

1. REPORT INFORMATION:

Report No. 2nd (Example: 1st, 2nd, 3rd, etc)

Period End Date 2/22/2007 (mm/dd/yyyy)

2. PERSONAL PROPERTY DISPOSED OF THIS YEAR:

The following items of clothing, furniture, vehicles or other personal effects of the protected person
were sold or otherwise disposed of during this accounting period. (If NONE, write "None")

none

3. PROTECTED PERSON ADDRESS:

The conservator represents that the present address of the protected person is:

Address: 123 Any Street

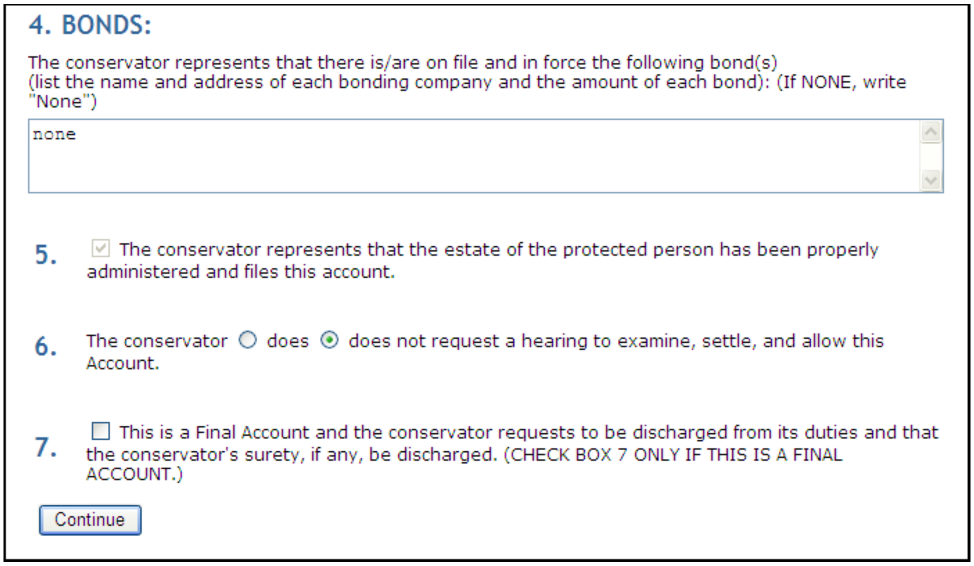
Address 2:

City: Any Town

State: MN (2 letter format)

Zip: 55102

and the present phone number is: 651-555-5555 .



4. BONDS:

The conservator represents that there is/are on file and in force the following bond(s) (list the name and address of each bonding company and the amount of each bond): (If NONE, write "None")

none

5. The conservator represents that the estate of the protected person has been properly administered and files this account.

6. The conservator does does not request a hearing to examine, settle, and allow this Account.

7. This is a Final Account and the conservator requests to be discharged from its duties and that the conservator's surety, if any, be discharged. (CHECK BOX 7 ONLY IF THIS IS A FINAL ACCOUNT.)

Continue

4. Bonds – list the name and address of each bonding company and the amount of each bond. If there is no bond, type "none".
5. The box to declare the conservator represents that the estate of the protected person has been properly administered to file this account is automatically checked and cannot be changed.
6. Check the appropriate box to request a hearing regarding this account.
7. Check the Final Account box only if this is a Final Account. Leave the box unchecked if this is not a Final Account
8. Click **Continue**.

II. Complete the Step 2 – Financial section:

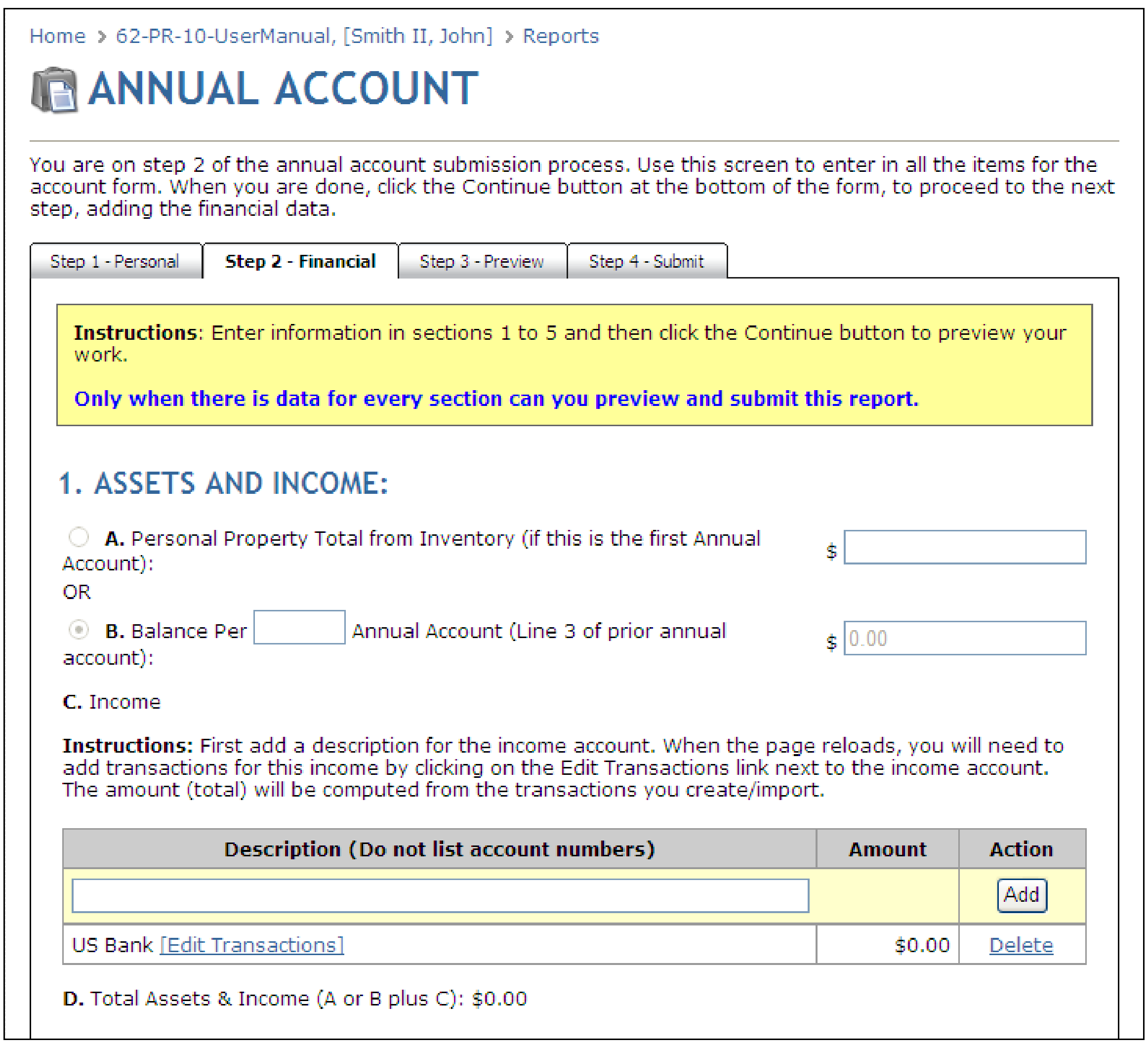
1. Assets and Income:

   A. Personal Property Total from Inventory – the balance from the Inventory will appear here, if this is the first Annual Account. This balance is automatically entered by the program and cannot be changed.

   B. Balance Per [blank] Account - the balance of the last submitted account will appear here. This balance is automatically carried forward as the beginning balance for the new accounts and cannot be changed.

   C. Income – enter a description of each income account (bank, investment, or other account) and click **Add** to create the income account. You may add multiple bank or investment accounts, as needed. Click **Edit Transactions** to add transactions to the account. Refer to the Editing Transactions section for instructions on entering and editing transactions.

   D. Total Assets & Income – This total is automatically updated as you enter transactions. The total can also be updated by clicking on the recalculate button at the bottom of the screen.



2. Expenses:

    A. Expenditures - enter a description of each expense account (bank, investment, or other account) and click **Add**.

       NOTE: In most cases, the expense accounts will bear the same name as the income accounts.

       Click **Edit Transactions** to add transactions to the account. Refer to the Editing Transactions section for instructions on entering and editing transactions.

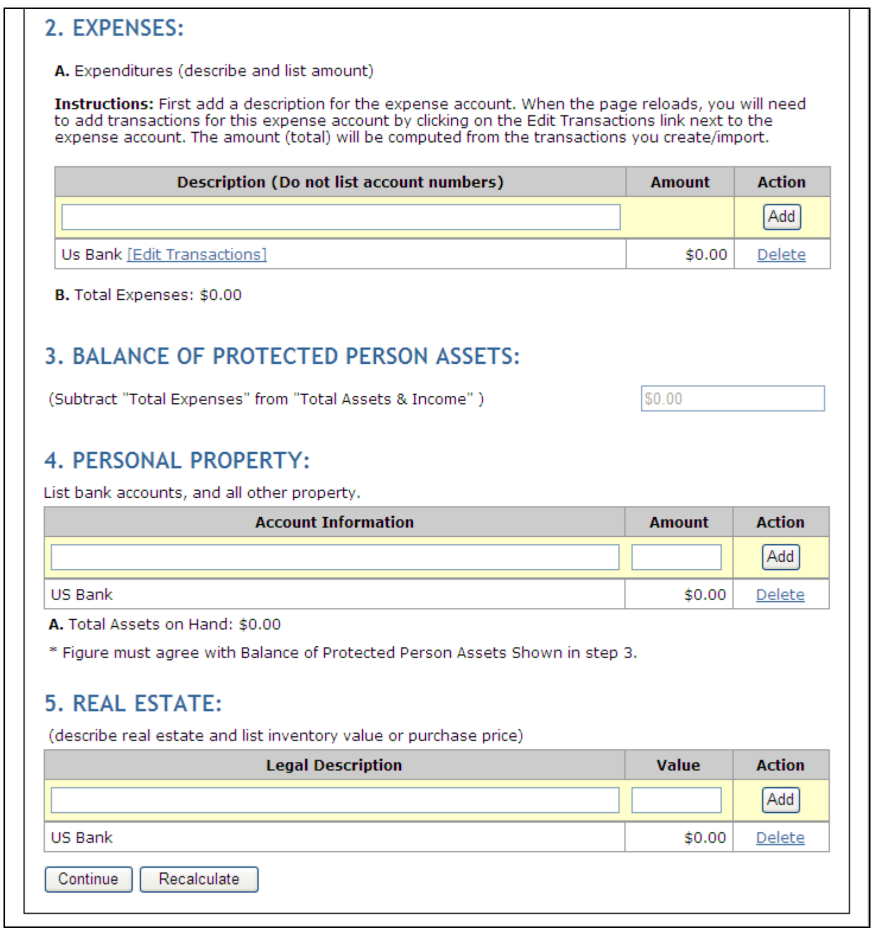
    B. Total Expenses This total is automatically updated as you enter transactions. The total can also be updated by clicking on the recalculate button at the bottom of the screen.

3. Balance of Protected Person Assets - This total is automatically updated as you enter transactions. The total can also be updated by clicking on the recalculate button at the bottom of the screen.

4. Personal Property – enter information on all of the protected person's personal property in your possession. If there is no property in a category, enter "NONE" and a value of "0".

    A. The "Total Assets on Hand" must equal the "Balance of the Protected Person Assets".

5. Real Estate - enter information on all of the protected person's real estate in your possession. If there is no real estate in a category, enter "NONE" and a value of "0".



2. EXPENSES:

A. Expenditures (describe and list amount)

Instructions: First add a description for the expense account. When the page reloads, you will need to add transactions for this expense account by clicking on the Edit Transactions link next to the expense account. The amount (total) will be computed from the transactions you create/import.

Description (Do not list account numbers)	Amount	Action
		Add
Us Bank [Edit Transactions]	$0.00	Delete

B. Total Expenses: $0.00

3. BALANCE OF PROTECTED PERSON ASSETS:

(Subtract "Total Expenses" from "Total Assets & Income") $0.00

4. PERSONAL PROPERTY:

List bank accounts, and all other property.

Account Information	Amount	Action
		Add
US Bank	$0.00	Delete

A. Total Assets on Hand: $0.00

* Figure must agree with Balance of Protected Person Assets Shown in step 3.

5. REAL ESTATE:

(describe real estate and list inventory value or purchase price)

Legal Description	Value	Action
		Add
US Bank	$0.00	Delete

Continue Recalculate

6. Click **Continue**.

7. To submit the report to the Court, complete Step 4 – Submit. Refer to the Submitting the Report section in this manual for instructions.

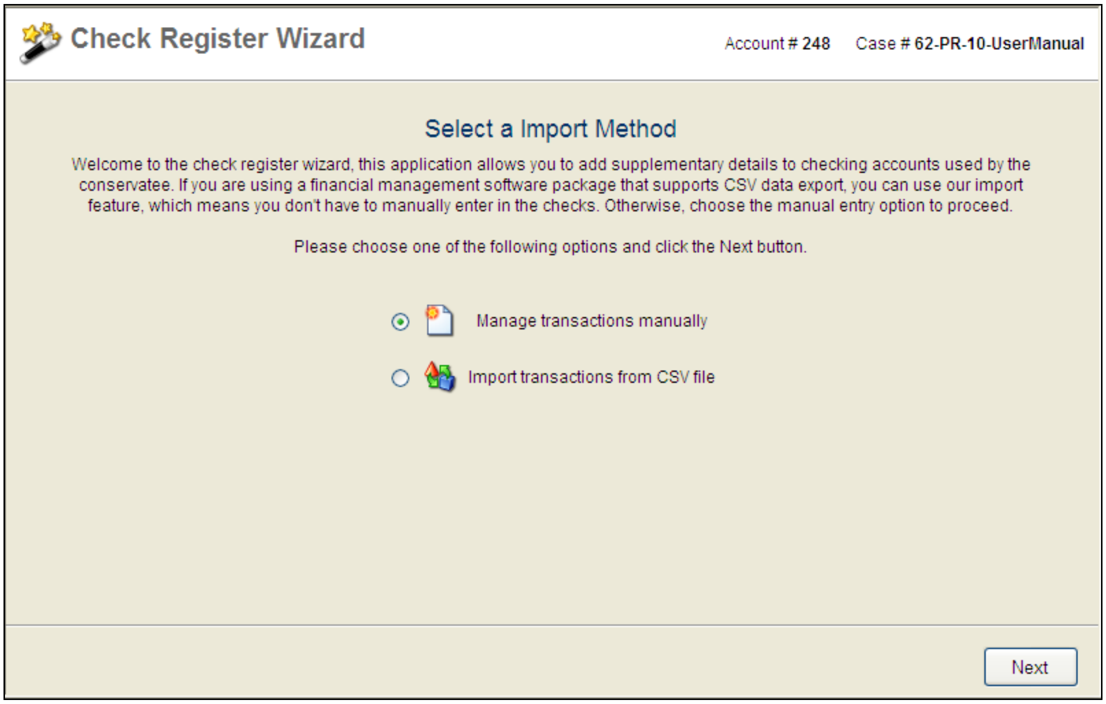
> **Important:**
>
> An annual account report is submitted **only once every year**. Once the report is submitted, it cannot be edited or deleted.
>
> If a mistake is made, the corrected information must be submitted by completing an Amended Annual Account. The Amended Annual Account will begin with the balance from the most recently submitted Annual Account. Show only adjustments on the Amended Annual Account.

Editing Transactions

After entering a description for an expense account and clicking **Add**, click **Edit Transactions** to add transactions for the expense account. Enter individual transactions either manually, or import them from a csv file.

To manage transactions manually:

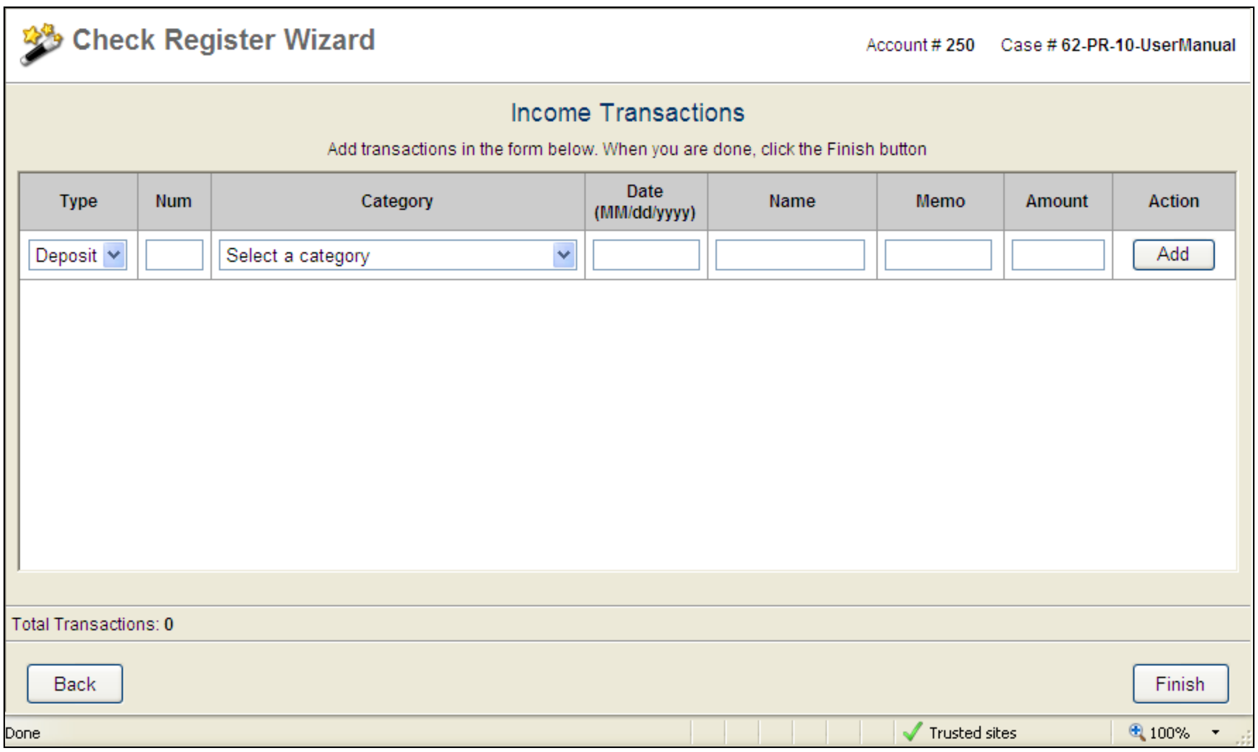
1. Select the **Manage transaction manually** radio button and click **Next**.



2. Under Type, click the drop-down and select the transaction type.
3. Under Num, enter the transaction number. If not numbered, enter “0”.
4. Under Category, select the appropriate income category from the drop-down.
5. Enter the date of the transaction.
6. Under name, enter a description of the transaction.
7. Under Memo, enter any pertinent additional information regarding this transaction.
8. Under Amount, enter the amount of the transaction.
9. When finished, click **Add**.

   After adding a transaction, Edit and Delete links appear for making changes or removing transactions.

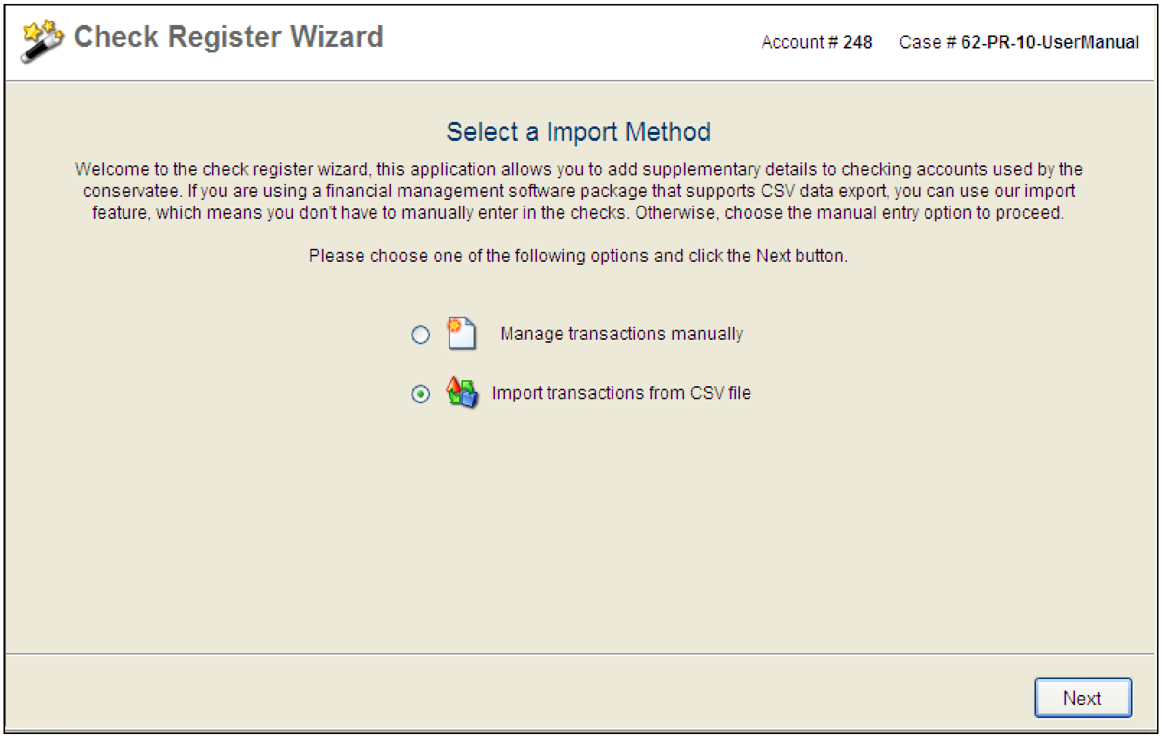
   Repeat the steps above for each transaction.



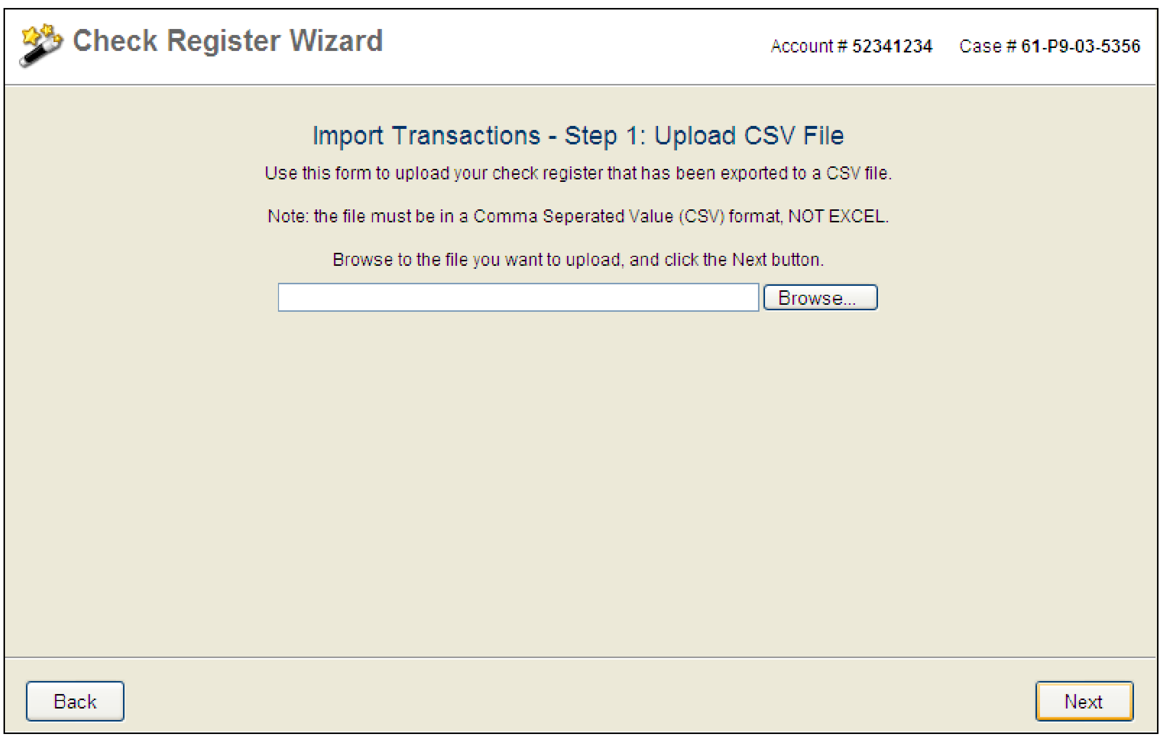
10. To save, click **Finish**.

To import transactions from a csv file:

1. Select the **Import transactions from CSV file** radio button and click **Next**.



2. Click **Browse** and locate the csv file previously created that you wish to import.
3. After selecting the file, click **Next**.



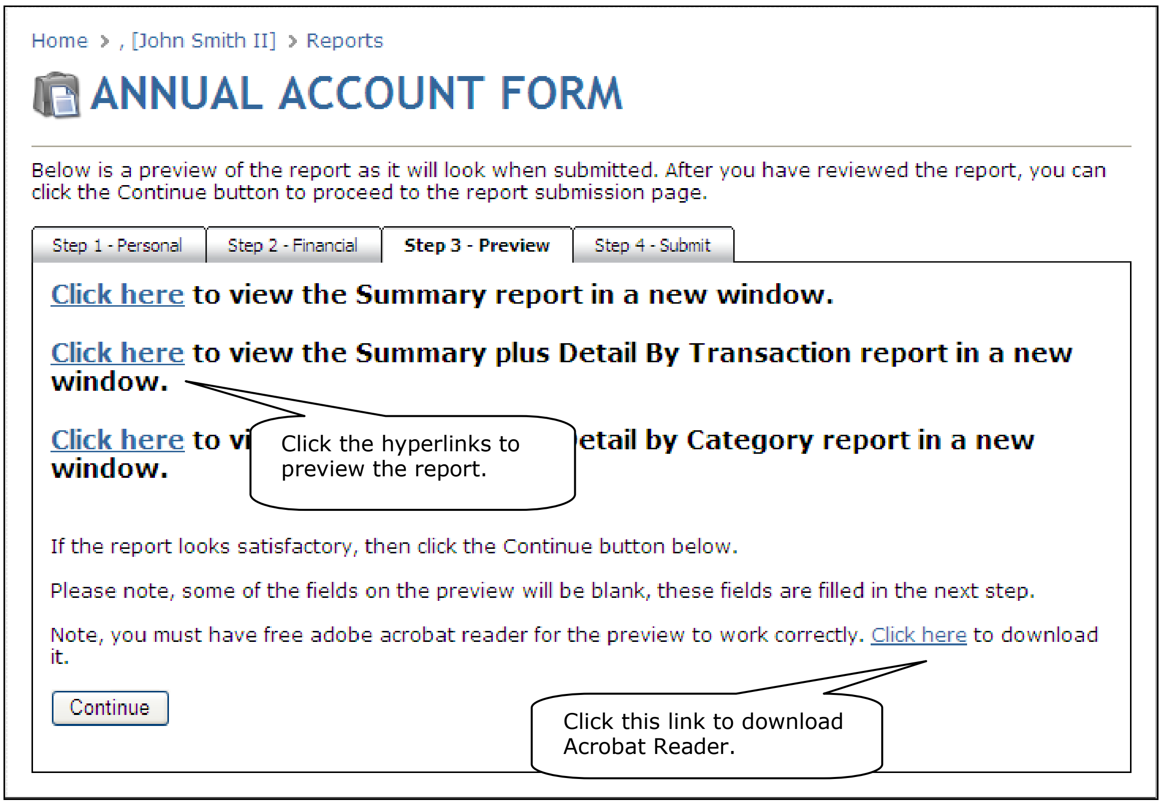
4. From the Preview screen, make any necessary corrections. If the data looks correct, click **Finish**.

5. To save all imported transactions, click **Close**.

> **Note:**
>
> To edit transactions either entered manually or imported, from the report page, click **Edit Transaction**s. From the Check Registry Wizard dialog, select **Manage transactions manually** and click **Next**. You may then edit or delete any individual income transaction that was previously entered or imported. Click **Update** to save changes. Click **Finish** to save all transactions.
>
> If a csv file does not import properly, refer to the FAQ section in this manual.

III. Complete Step 3 – Preview:

1. From this page, preview the report in a PDF format using Adobe Acrobat Reader. If you do not have Acrobat Reader, a link is provided to down load it for free.



> **Note:**
>
> Attorney information will not be available on the PDF preview. Enter attorney information in Step 4 – Submit.

2. From the Step 3 – Preview tab, click **Continue**.

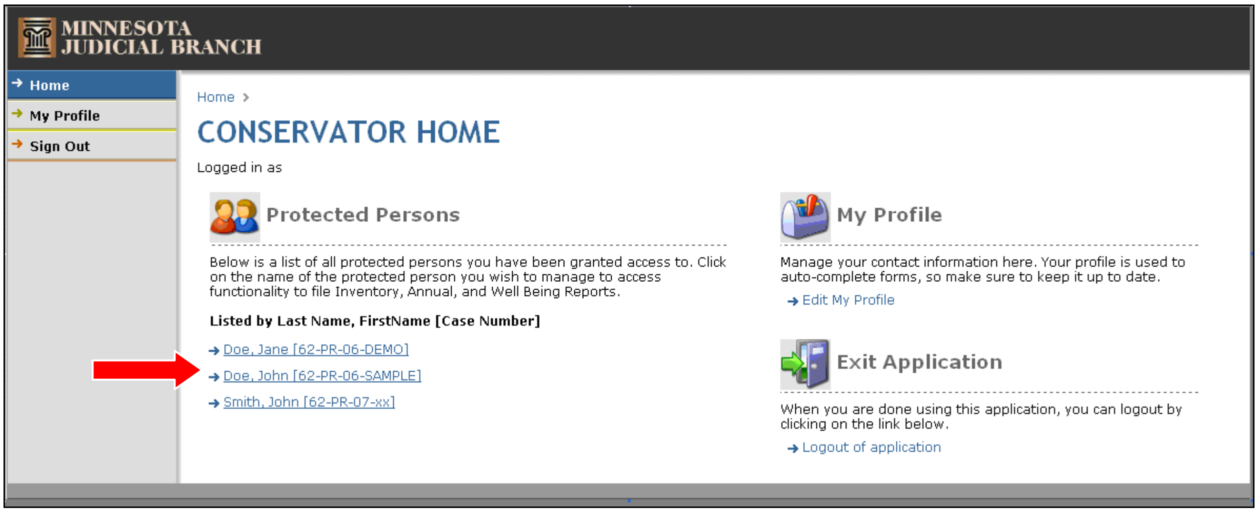
IV. To submit the report to the Court, complete Step 4 – Submit. Refer to the Submitting the Report section in this manual for instructions.

Entering a Personal Well-Being Report

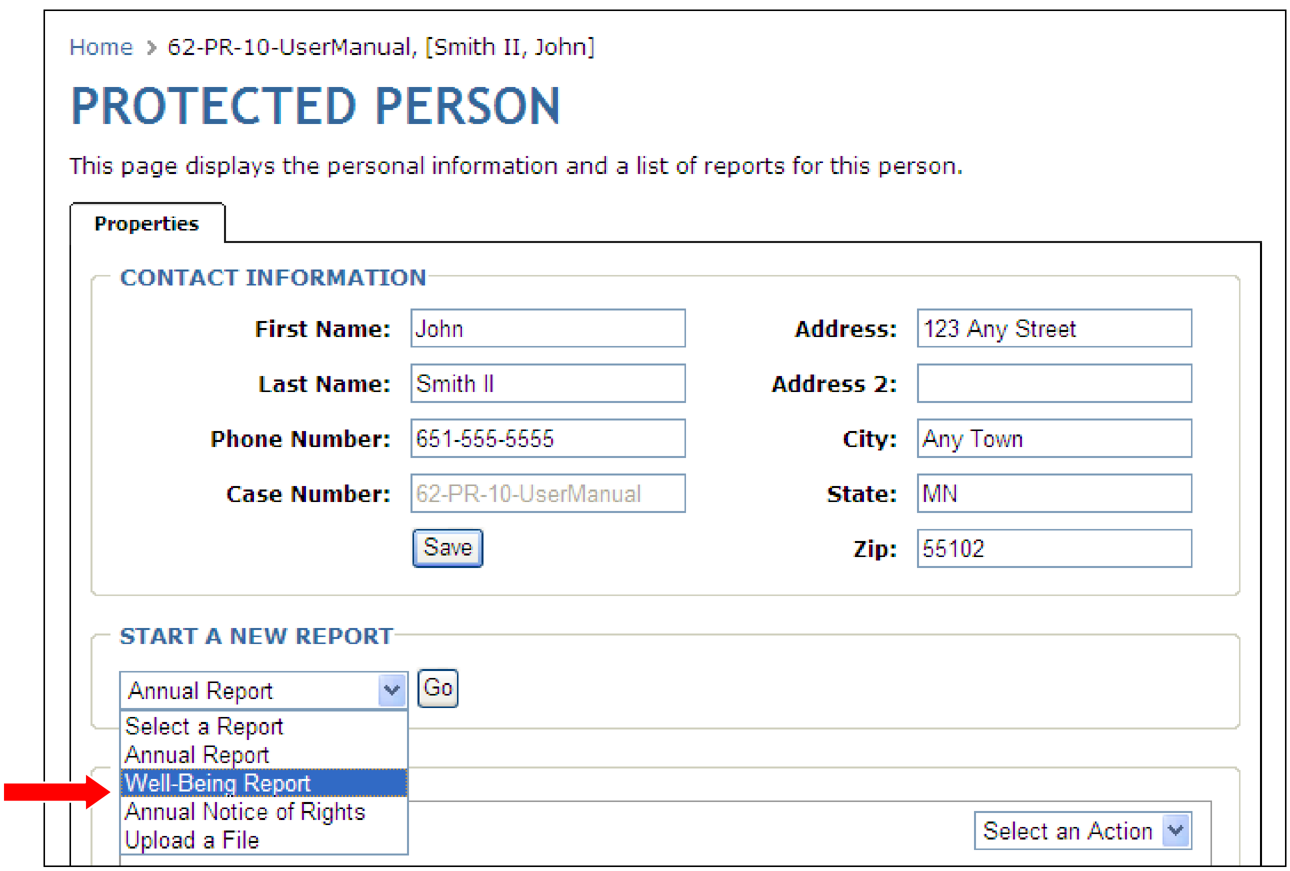
The Personal Well-Being Report is an annual report that is to be submitted only once every year.

NOTE: An on-line Personal Well-Being report is provided for those conservators that are also appointed as guardian. If you are not also the guardian of the protected person, you do not need to complete this report.

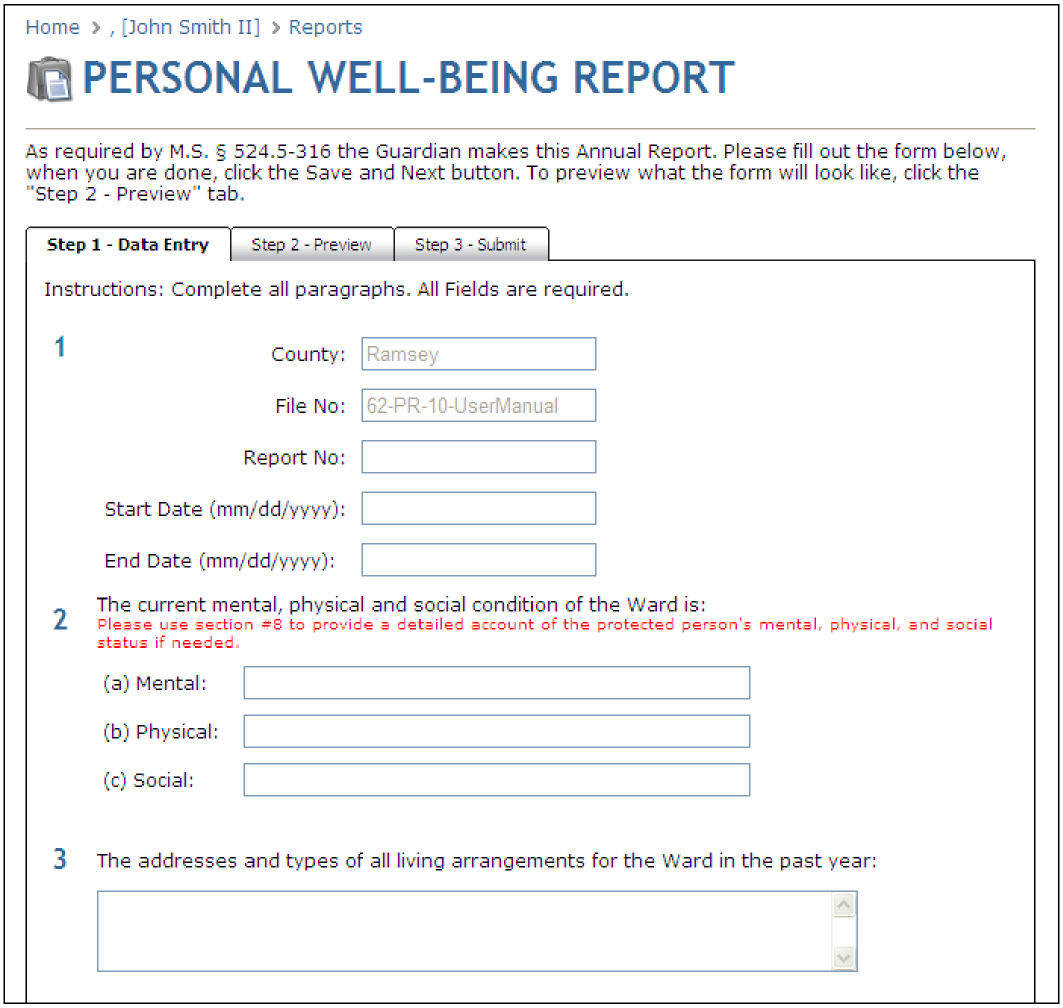
From the Conservator Home page, under the Protected Persons heading, select the case file for which you wish to create the Personal Well-Being Report.



The reports page for the selected protected person appears. Under the Start a New Report heading, click the drop-down, select **Well-Being Report**, and click **Go**.



I. Complete the Step 1 – Data Entry section:



Home > , [John Smith II] > Reports

PERSONAL WELL-BEING REPORT

As required by M.S. § 524.5-316 the Guardian makes this Annual Report. Please fill out the form below, when you are done, click the Save and Next button. To preview what the form will look like, click the "Step 2 - Preview" tab.

Step 1 - Data Entry | Step 2 - Preview | Step 3 - Submit

Instructions: Complete all paragraphs. All Fields are required.

1

County: Ramsey

File No: 62-PR-10-UserManual

Report No:

Start Date (mm/dd/yyyy):

End Date (mm/dd/yyyy):

2 The current mental, physical and social condition of the Ward is:

Please use section #8 to provide a detailed account of the protected person's mental, physical, and social status if needed.

(a) Mental:

(b) Physical:

(c) Social:

3 The addresses and types of all living arrangements for the Ward in the past year:

Note:

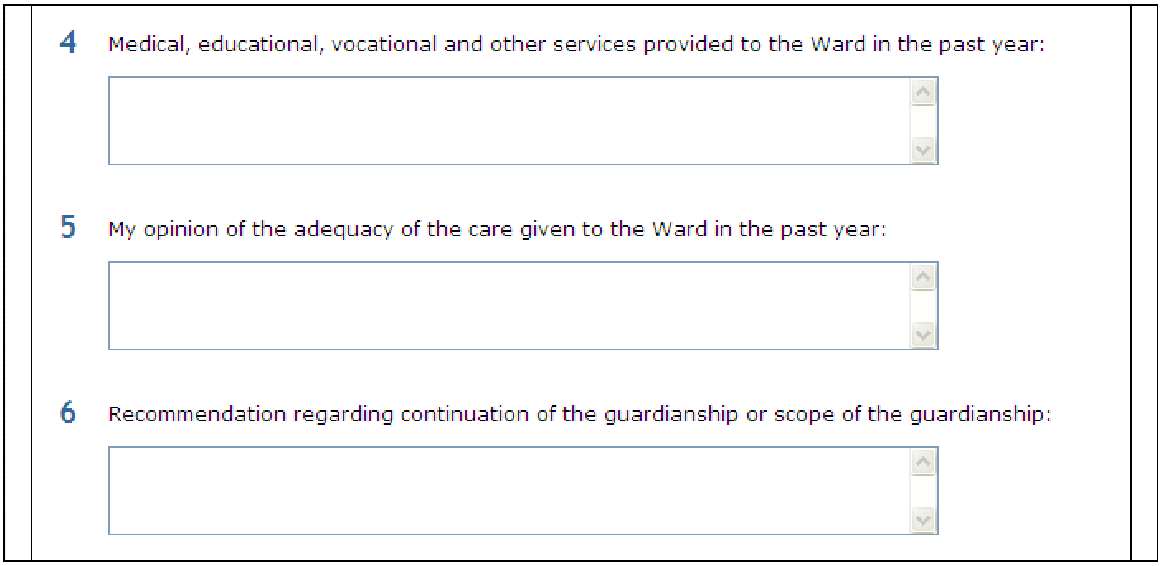
Except for section 8, there must be an entry in each section. If a section does not apply, type "none" or "does not apply".

1. Enter the Report Number, Start Date, and End Date.
2. Enter information on the ward's mental, physical, and social status. If a more detailed account of the ward's mental, physical, and social status is needed, you may enter additional information in section 8.
3. Type the addresses and types of all living arrangements for the ward in the past year.

4. Enter any medical, educational, vocational and other services provided to the ward in the past year.

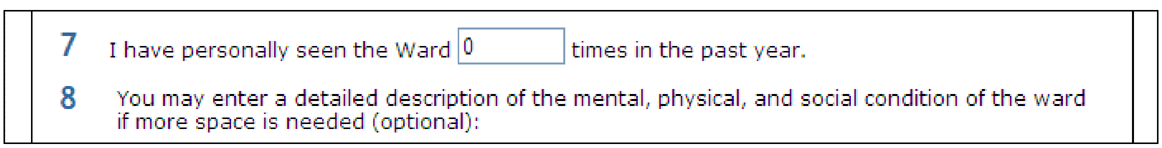
5. Provide your opinion on the adequacy of the care given to the ward in the past year.

6. Provide any recommendation regarding the continuation of the guardianship or scope of the guardianship.



7. Enter the number of times you have seen the ward in the past year.

8. Enter any lengthy descriptions of the mental, physical, and social condition of the ward.



9. To save the draft report and finish at a later time, click **Save**.

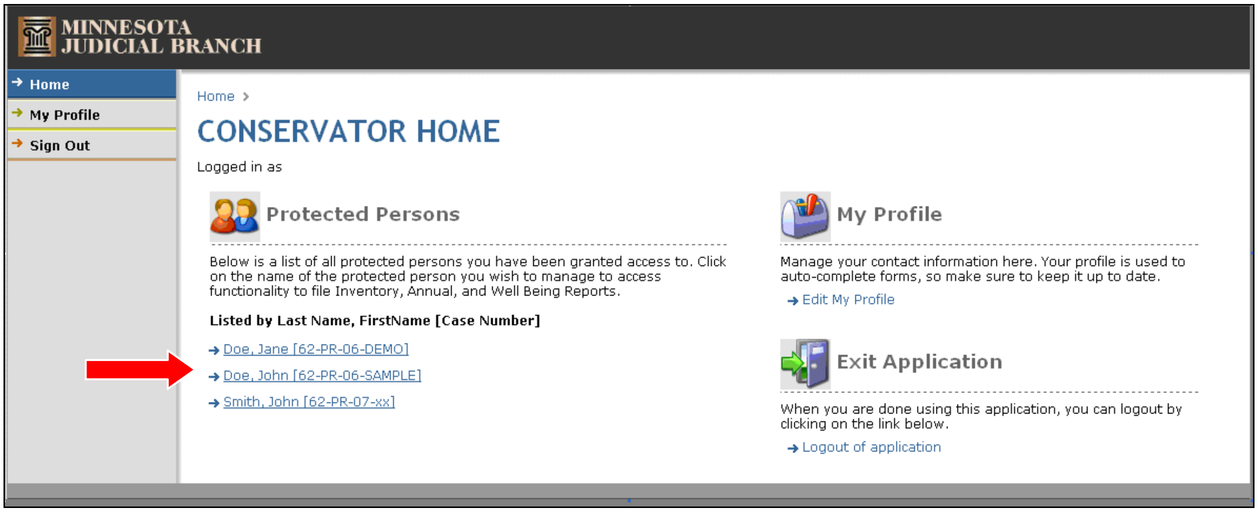
II. To Preview a completed report, click **Save and Preview** and complete Step 2 - Preview. The Well-Being report opens as a PDF file for you to review.

III. If the Well-Being report is ready to submit to the court, click the **Step 3 – Submit** tab at the top of the report. Refer to the Submitting a Report section in this manual for instructions.

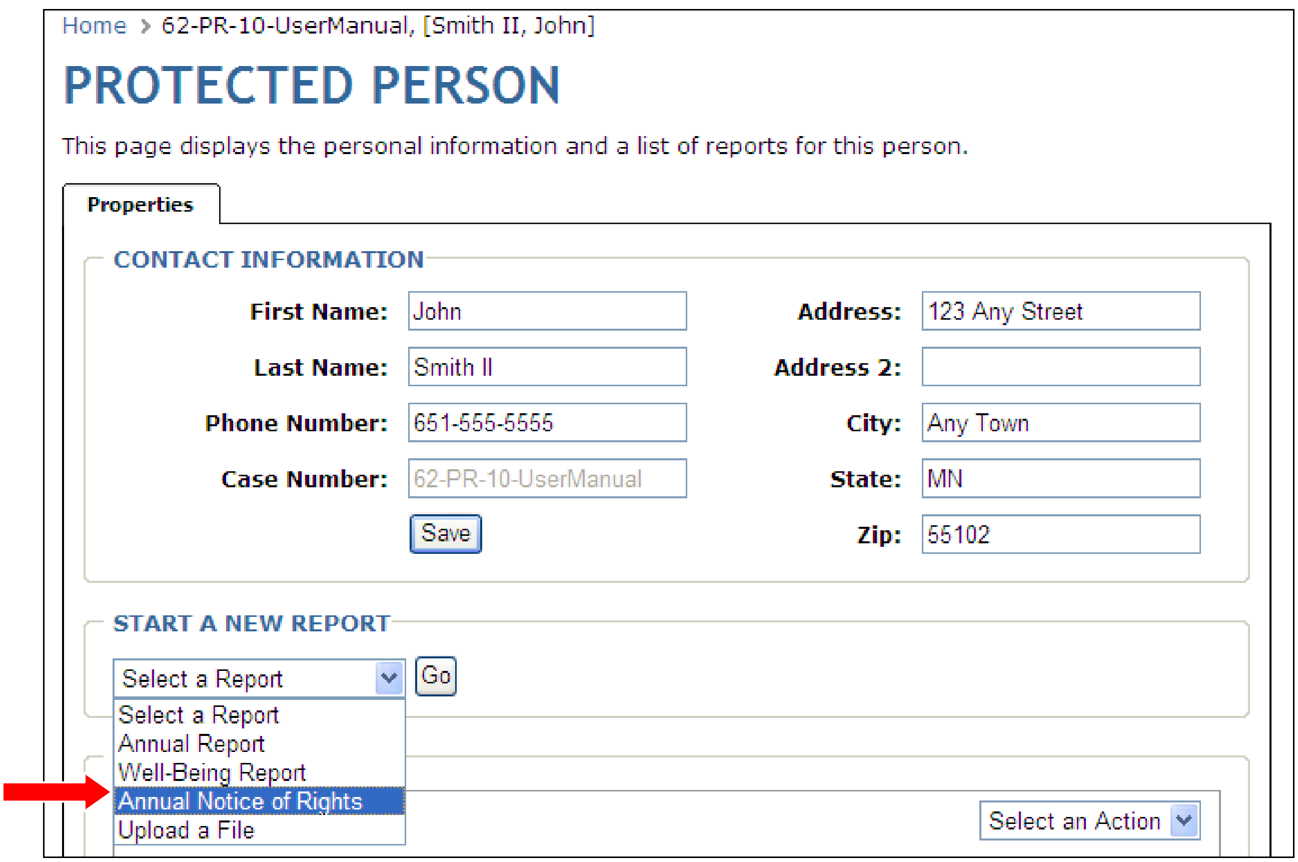
Creating an Annual Notice of Rights Form

Every year the protected person must be given a notice of the right to petition the court for restoration to capacity. The verification and proof of giving this notice to the protected person by mail or in person is included on the Submit tab of the Annual Account that is filed each year.

From the Conservator Home page, under the Protected Persons heading, select the case file for which you wish to create the Annual Notice of Rights Form.



The reports page for the selected protected person appears. Under the Start a New Report heading, click the drop-down, select **Annual Notice of Rights**, and click **Go**.



1. The Annual Notice of Rights document opens with all the protected person's information filled in the fields. You do not have to perform any data entry to this notice.

2. Print the Notice and close the PDF window.

State of Minnesota

District Court
Probate Division

County of Ramsey

Judicial District: 2nd District
Court File No. 62-PR-10-UserManual
Case Type: 14, Guardianship

In Re: Guardianship or Conservatorship of

John Smith II
Ward / Protected Person

Annual Notice of Right to Petition for Restoration to Capacity

To: John Smith II Ward / Protected Person

You have a right to ask the Court to end the guardianship or conservatorship or to modify the guardianship or conservatorship by filing a petition with the Court explaining why you believe the guardianship or conservatorship should end or be modified.

You have a right to object to the Guardian's change in your place of residence, and you have a right to ask the Court for a change of residence, by filing a petition with the Court explaining why the change should or should not be made.

If you wish to have a different guardian or conservator then you must file a petition for removal of the guardian or conservator, explaining why you believe the present guardian or conservator should be removed.

To petition the court you may call the Court Monday through Friday between 8:00 a.m. and 4:30 p.m. and ask that a form be sent to you or pick up the proper form at the Court and file it there. The address of the Court is: Ramsey County Probate Court
650 Courthouse
15 Kellog Boulevard West
St. Paul, MN 55102-1612

and phone number is . 651-266-8145

After a petition is filed the Court will schedule a hearing. You have the right to be present at that hearing and to have a lawyer represent you. If you cannot afford a lawyer, the Court will appoint one for you. You can call the Court to request a Court appointed attorney.

This notice must be served annually on the ward or protected person within thirty days after the anniversary of the appointment of the guardian or conservator.

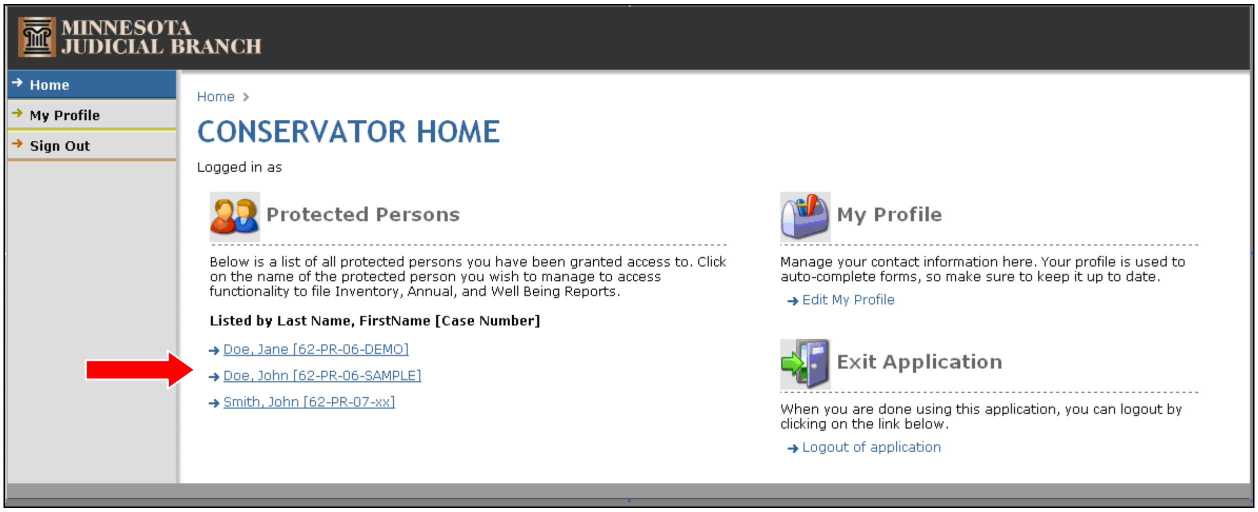
THIS PAGE MUST BE GIVEN TO THE WARD/PROTECTED PERSON

3. Either mail or personally deliver the printed Annual Notice of Rights form to the protected person.

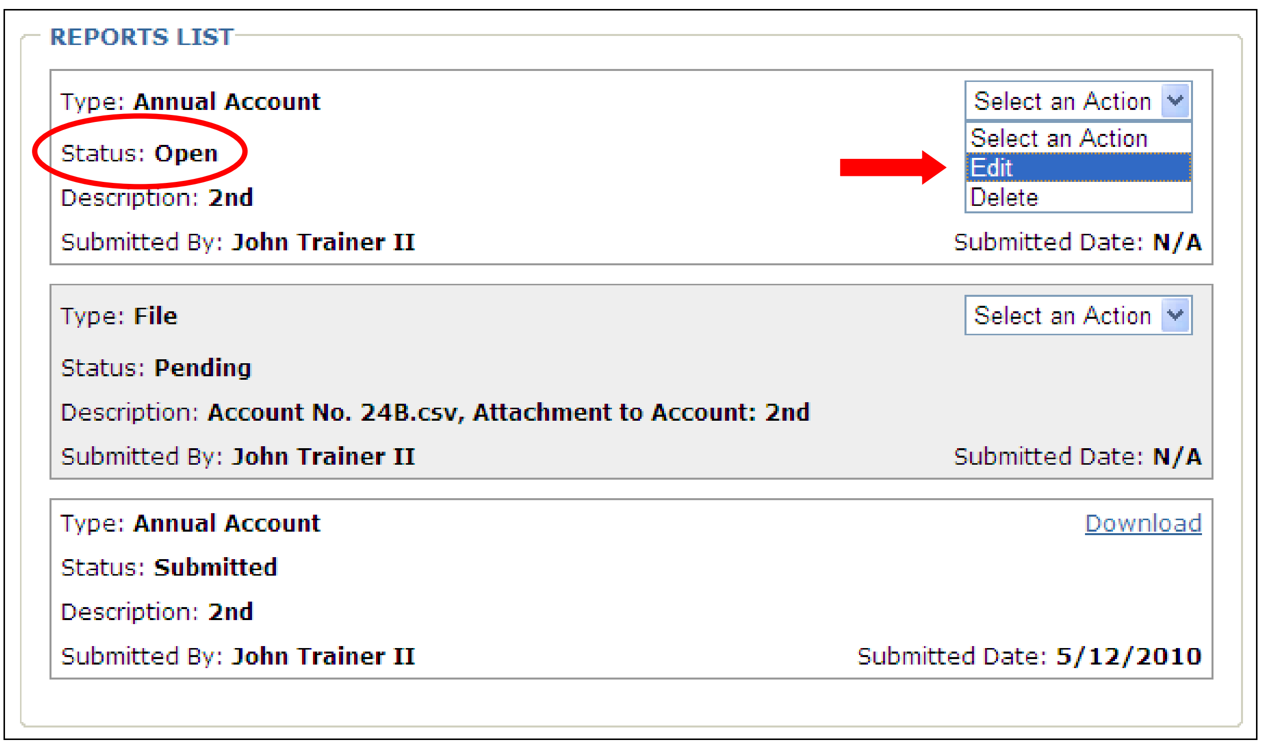
Editing and Updating a Report

Within the Conservator Report Filing system, users may create new reports, as well as edit reports in progress, or make changes to a report before submitting to the court.

1. From the Conservator Home page, under the Protected Persons heading, select the case file for which you wish to edit/update a report.

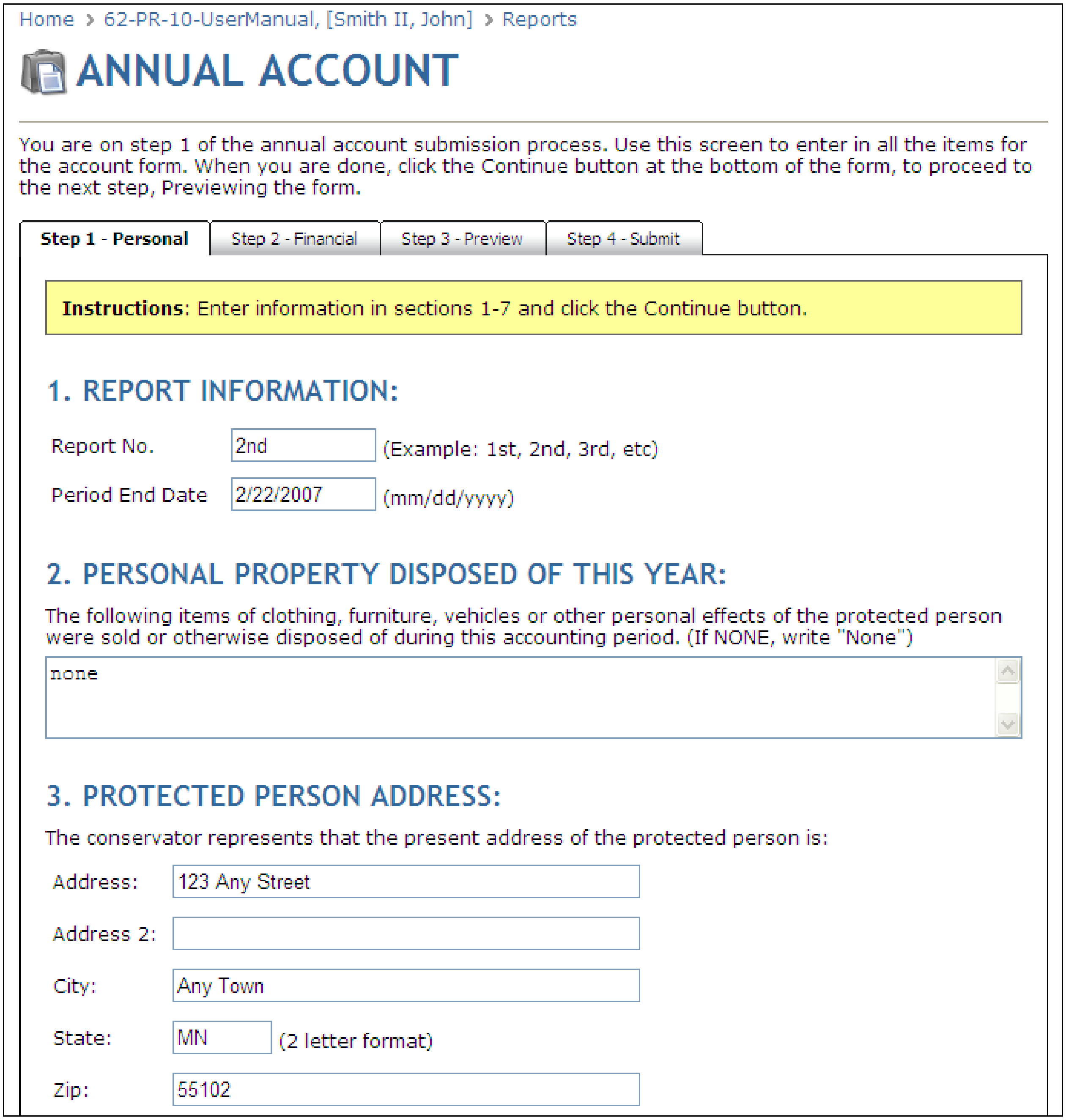


2. The reports page for the selected protected person appears. Under the Reports List heading, saved reports that have not been submitted to the court have a status of Open. Click the Select an Action drop-down, select **Edit**.



3. The saved report displays, starting at Step 1.

4. To make updates to other parts of the form, click a tab at the top, or click **Continue**. To make changes to Income or Expense Transactions already entered refer to the Editing Transactions section of this manual.



Home > 62-PR-10-UserManual, [Smith II, John] > Reports

ANNUAL ACCOUNT

You are on step 1 of the annual account submission process. Use this screen to enter in all the items for the account form. When you are done, click the Continue button at the bottom of the form, to proceed to the next step, Previewing the form.

Step 1 - Personal | Step 2 - Financial | Step 3 - Preview | Step 4 - Submit

Instructions: Enter information in sections 1-7 and click the Continue button.

1. REPORT INFORMATION:

Report No. 2nd (Example: 1st, 2nd, 3rd, etc)

Period End Date 2/22/2007 (mm/dd/yyyy)

2. PERSONAL PROPERTY DISPOSED OF THIS YEAR:

The following items of clothing, furniture, vehicles or other personal effects of the protected person were sold or otherwise disposed of during this accounting period. (If NONE, write "None")

none

3. PROTECTED PERSON ADDRESS:

The conservator represents that the present address of the protected person is:

Address: 123 Any Street

Address 2:

City: Any Town

State: MN (2 letter format)

Zip: 55102

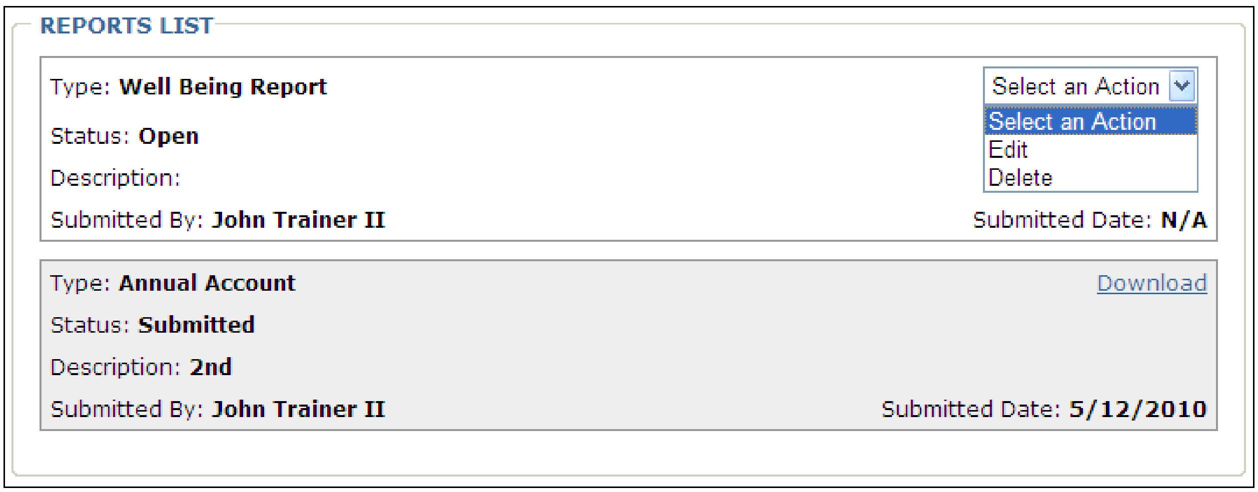
5. When finished with the changes, the report may be saved and worked on at a later date or submitted to the court. To submit the report, refer to the Submitting the Report to the Court section in this manual.

Deleting a Report

1. After selecting the case file for which you wish to delete a report. Under Reports List, reports or files that are in an Open or Pending status may be deleted. Submitted reports may not be deleted.

2. From the Select an Action drop-down, select **Delete**.

> **Important:**
>
> Once a saved report is deleted, it may not be recovered. All information previously entered will be lost.

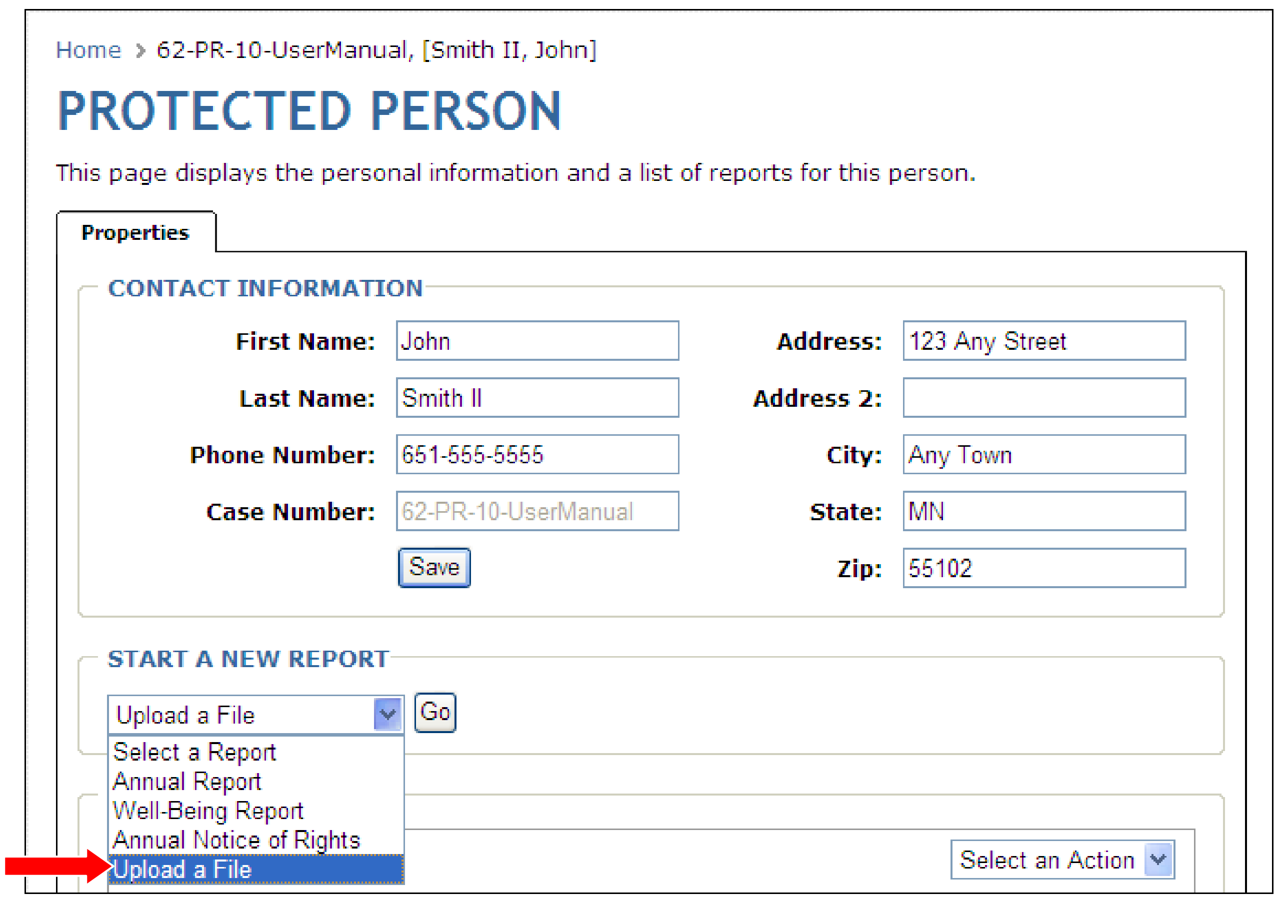


Submitting Supporting Documentation (PDF Files)

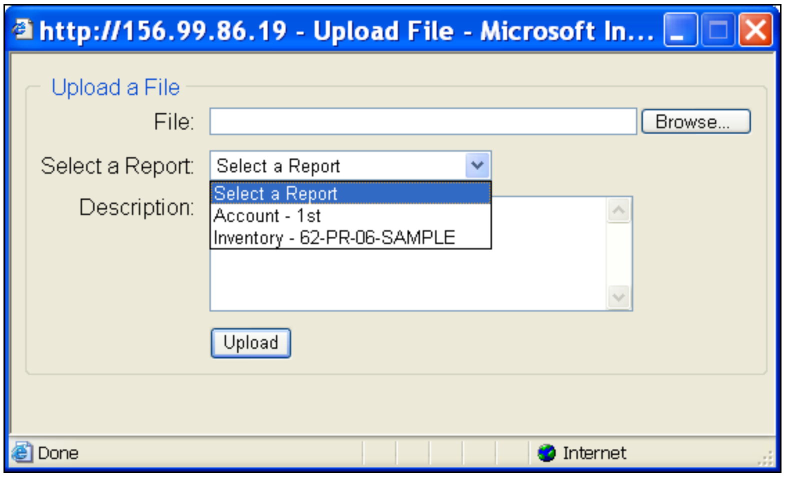
Supporting documentation (e.g., vouchers, verification of funds on deposit, etc.) can be attached to a report and submitted to the Court. All supporting documentation must first be converted to a PDF file.

From the Conservator Home page, under the Protected Persons heading, select the case file for which you wish to attach supporting information.

The reports page for the selected protected person appears. To attach and submit supporting documentation, from the Start a New Report drop-down select **Upload a File** and click **Go**.



1. The Upload a File dialog appears. Click Browse and search for the PDF file you wish to attach as supplemental documentation. After selecting the file, select the report to which the supplemental document relates. After selecting the related report, In the Description field, enter a brief description of what you are submitting.



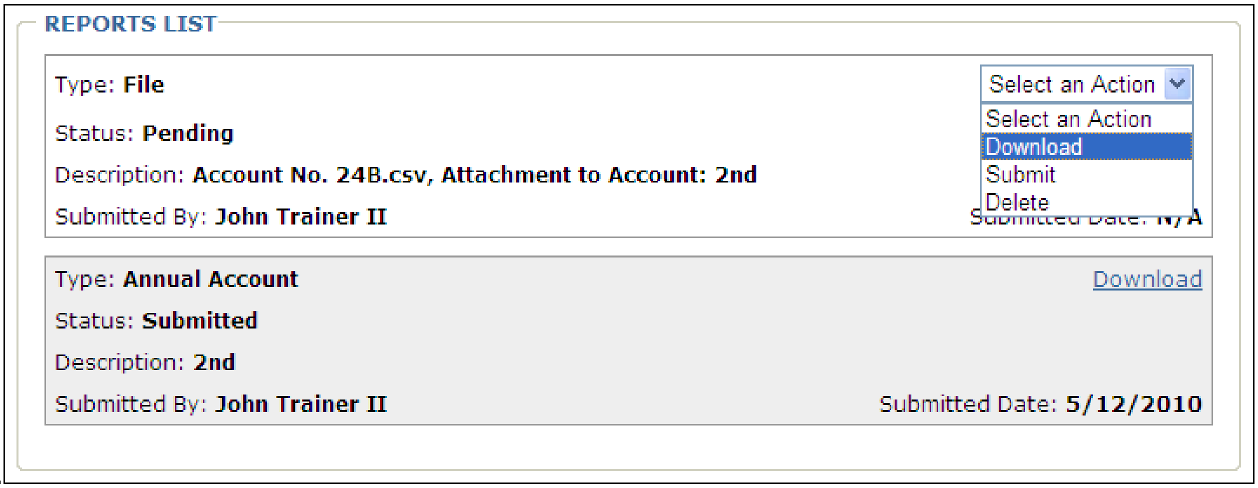
2. Click **Upload** to prepare the file for submission.

3. A warning message appears regarding the time it will take to upload the file depending on the file size. Click **OK**.

Note: After uploading the file for submission, the Protected Person screen appears and the uploaded file has a status of Pending.

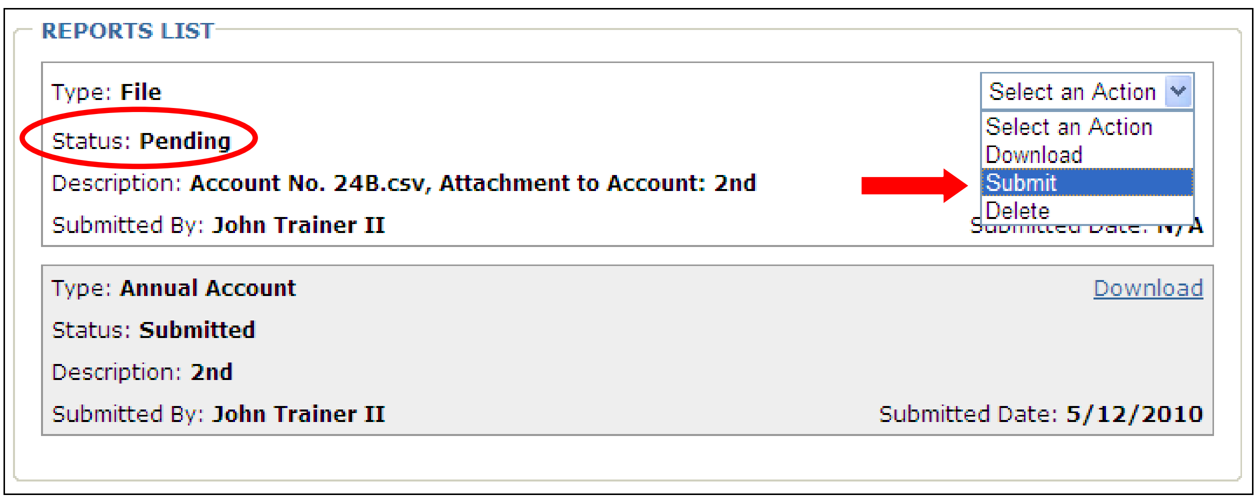
Important: It is strongly suggested that users first view the file before submitting it to ensure it is the correct file.

4. To view the file, from the Select an Action drop-down, select **Download**.



5. The file opens in a preview window for you to verify it is the correct file. You may then close the preview window.

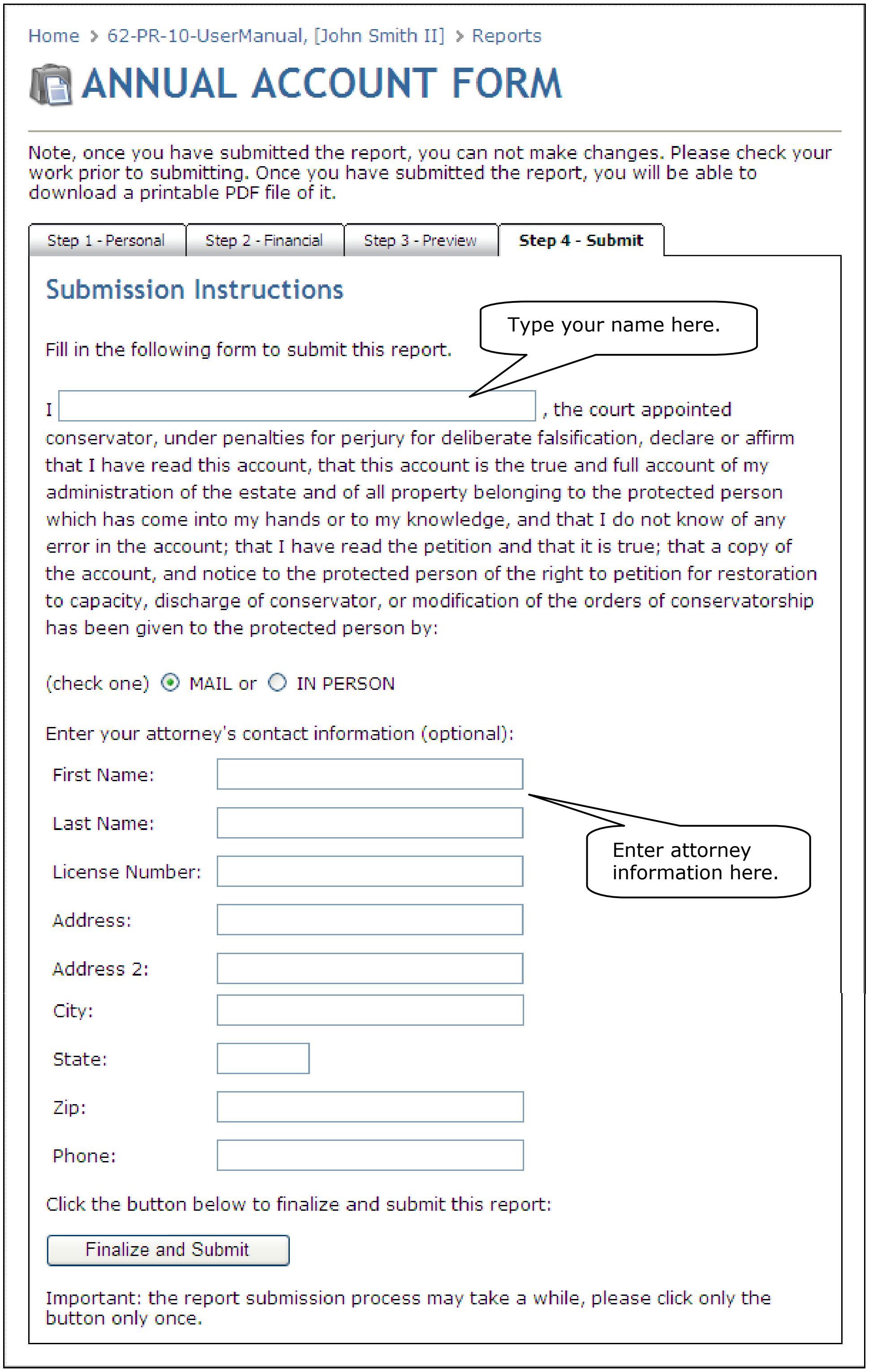
6. After verifying the correct file has been uploaded, to submit the file, click **Submit** from the Select an Action drop-down.



Note: Use extreme caution in selecting the correct file to upload and submit. Once a file is submitted, **it cannot be undone**. Files must be submitted in a PDF format.

Submitting the Report to the Court

1. When ready to submit the report to the Court, complete Step 4 – Submit:



Home > 62-PR-10-UserManual, [John Smith II] > Reports

ANNUAL ACCOUNT FORM

Note, once you have submitted the report, you can not make changes. Please check your work prior to submitting. Once you have submitted the report, you will be able to download a printable PDF file of it.

Step 1 - Personal | Step 2 - Financial | Step 3 - Preview | **Step 4 - Submit**

Submission Instructions

Type your name here.

Fill in the following form to submit this report.

I ______ , the court appointed conservator, under penalties for perjury for deliberate falsification, declare or affirm that I have read this account, that this account is the true and full account of my administration of the estate and of all property belonging to the protected person which has come into my hands or to my knowledge, and that I do not know of any error in the account; that I have read the petition and that it is true; that a copy of the account, and notice to the protected person of the right to petition for restoration to capacity, discharge of conservator, or modification of the orders of conservatorship has been given to the protected person by:

(check one) MAIL or IN PERSON

Enter your attorney's contact information (optional):

First Name:
Last Name:
License Number:
Address:
Address 2:
City:
State:
Zip:
Phone:

Enter attorney information here.

Click the button below to finalize and submit this report:

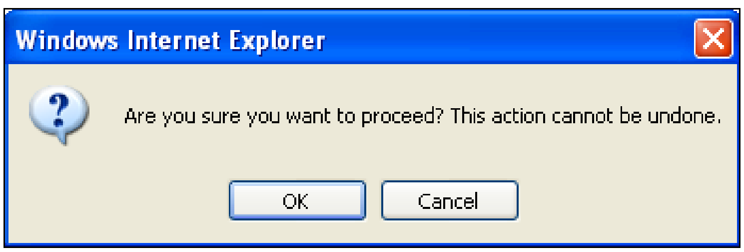
Finalize and Submit

Important: the report submission process may take a while, please click only the button only once.

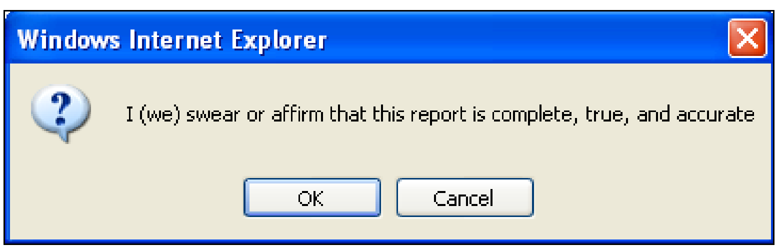
2. Sign the report by typing your name in the box located in the affirmation statement. If there is more than one conservator, all conservator names must be typed in the box. By typing your name(s) and submitting the report to the Court, you are declaring under penalty of perjury that, to the best of your knowledge, the report is true and correct, and that you have given the protected person the required annual notice of right to petition for restoration to capacity.

> **Note:**
>
> If there is more than one conservator, type all names of conservators in this text box.

3. Select whether you mailed or personally gave the protected person the required notice of the right to petition for restoration to capacity.
4. If you have an attorney, enter the attorney information. If you do not have an attorney, leave the attorney fields blank.
5. Once the report is ready to save and submit to the court, click **Finalize and Submit**.
6. A confirmation message appears. Click **OK** to continue.



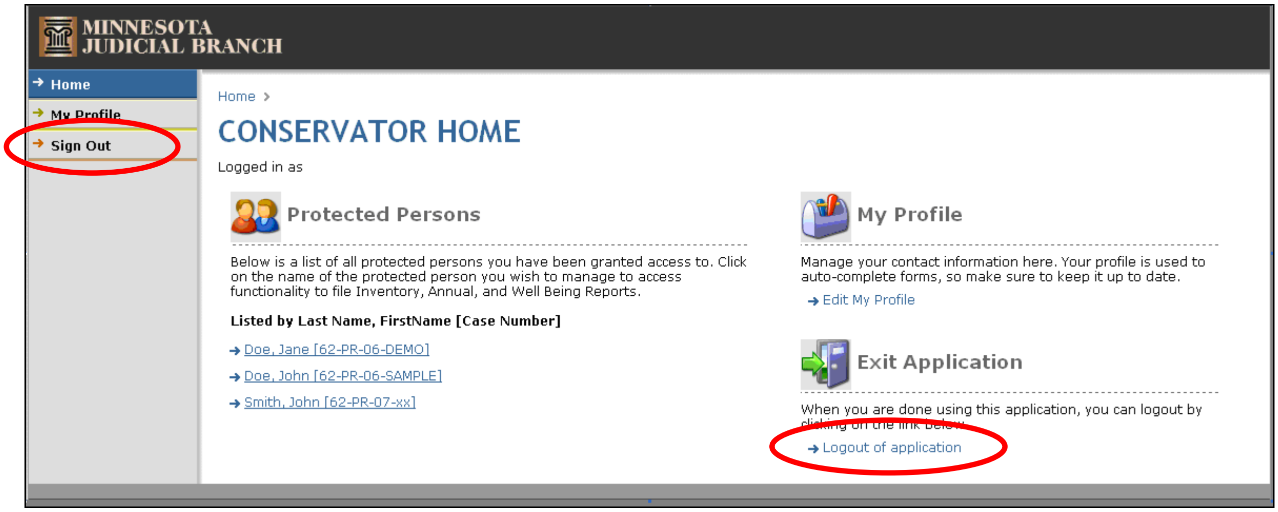
7. A final message appears, confirming that you swear or affirm that the report is complete, true, and accurate. Click **OK** to continue.



> **Important:**
>
> Once the report is submitted, it cannot be edited or deleted.

Logging Out

To log out of the application, from the Conservator Homepage, click either **Sign Out** in the left-hand navigation pane or click **Logout of the application** under the Exit Application heading.



Appendix A

Frequently Asked Questions

Q: How do I amend my Inventory?

A: Changes may not be made to an inventory once it is submitted. In the event you need to add additional items, remove items, or have a mistake on the inventory, make the adjustment on the Annual Account. You may wait until the first Annual Account Report to make the adjustment, or you may submit an interim account to reflect the adjustment.

Q: How do I amend an Annual Account?

A: Changes may not be made to an account once it is submitted. You may submit an amendment to the accounting to reflect the specific adjustments that are needed. The program will carry forward the ending balance of the previously submitted account. Therefore, you should show only the adjustments on the amendment.

Q: How do I sign my report?

A: Accessing and submitting an account through the use of a combination of your user name and password is considered your signature on the report. By submitting a report or other document using this method, you are declaring, under penalties of perjury, that all statements are true and accurate to the best of your knowledge.

Q: My expense and/or income items do not import properly. What is wrong?

A: Check for the following items:

1. Is the file you are trying to import a "csv" file?
2. Do you have more than one header line?
3. Do the header names in your csv file exactly match the header names in the accounting program?
4. Do your income and expense account names exactly match the account names in the accounting program?

Q: Can my supporting documentation be submitted in a paper format?

A: The preferred method for submitting supporting documentation is in an electronic format. Most scanning software has a PDF converter. Commercial PDF converters are readily available for purchase at most computer stores or via the Internet at a nominal cost. If you must submit supporting documentation in a paper format, include a cover letter with the submission so that the clerk's office can match the submission with the correct court file and document.

Appendix B

Court Contact Information

Probate Court Information:

Contact the court where your case was filed.

Guardianship/Conservatorship Filings:

Contact the court where your case was filed.